



**COACHING**

**PLAYBOOK**



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**THE ONLY COACHING CONVERSATION MANAGERS NEED THAT  
WILL ENSURE YOUR SALES TEAM ACHIEVES THEIR GOALS**

**A Step-By- Step Conversational Strategy and  
Coaching Talk Track To Develop Their  
Skills, Confidence, Attitude, Accountability & Buy-In Around Their Goals**

**Sales quotas are set, but is there alignment, buy-in, COMMITMENT and a bulletproof strategy to achieve them? Are you certain your sales team has the SKILLS, MESSAGING, fearless ATTITUDE, SELF-ACCOUNTABILITY, TIME MANAGEMENT strategy, and structure to thrive? And are they excited about what they can achieve this year?**

**Here's the 7-step strategic conversation that gets your salespeople confidently committed to their goals, strategy, and the coaching needed to ensure they execute, excel, and enjoy the process.**

**This** isn't just about setting the right goals. You have that conversation, good or, well, most of the time, ineffectively. (Example: "Here's your quota for the year. I know you can do it! Make it happen!")

**This** is about the conversation most managers are NOT having that goes overlooked, which will determine whether that salesperson will have a successful year. It's the *deeper conversation* between management and each person on their team that needs to take place **after** the goals are set—the conversation that not only covers strategy, alignment of goals and responsibilities, but encapsulates everything to ensure expectations around coaching, performance and personal accountability are clearly set, managed, and aligned to ensure success throughout the year.

What follows is the **7-step conversation**, coaching talk tracks and questions you need to effectively conduct this conversation, so that each person can develop, and own, a clear path to achieve their goals. Fine-tune this conversation to fit your situation and the needs of each person you're managing. Note that this template is incredibly thorough to ensure you develop an impenetrable foundation and blueprint for success, providing you with the peace of mind and confidence that you'll achieve your sales targets *without* the daily worry or stress!

**Tip from the Coach:**

*Transform from just being a strategic thinker and become a strategic communicator and questioner.*

**This strategy is guaranteed to work, as long as the following baselines are in place:**

1. Clear expectations around coaching have been set.
2. You're already effectively and consistently coaching your people—and you have feedback and evidence to support the value they gain from your coaching.
3. You have a relationship built on trust, not seniority nor obligation with your people.
4. The sales goals are already set for the year.

**This 7-STEP STRATEGY will create the trust, alignment, strategy, messaging, accountability, skills, attitude, and the collaborative focus needed for you and your team to create your best year yet!**

## Step 1: Positioning the Goal Attainment/Success Plan Review

This is a short step that's too important to rush. After all, *planning and training for the race IS always more important and takes longer than the race itself*. If it's part of your company culture and normal business cadence for your salespeople or your sales managers (if you're a manager of managers) to develop their yearly sales plan, do a quick level-set to ensure they're comfortable creating their sales/business plan to attain their goals.

**From The Sidelines:** *This conversation is not time sensitive. That is, while it's most effective at the beginning of your fiscal year, you can always enroll people in this conversation, AT ANY TIME, while building trust and resetting your relationships, if needed.*

If you fail to set proper expectations and create the shared alignment around a common goal, you're leaving it up to your direct reports to form their own conclusions and assumptions around your agenda, which breeds worry and uncertainty. The risk here is, even if your intentions are pure, when people aren't aware of what your intentions are, especially if you're the boss, the default file for every human being is **fear!** ("What did I do wrong? Am I getting fired? Am I going to get painfully interrogated about my sales plan? Am I in trouble?") Here's what that can sound like to build trust in you and your intention in seconds, simply by being vulnerable and honoring the **Art of Enrollment**.

1. Here's what we're doing/ Here's what I've observed.
2. Here's why we're doing it.
3. Here's what's in it for you.
4. Are you open to having this conversation?

**Coaches Corner:** *The ONLY THREE non-negotiable guidelines to create alignment, buy-in, accountability and excitement around their sales goals. 1. ENROLL 2. ENROLL 3. ENROLL! Otherwise, resistance is imminent.*

*"I'd love to chat with you about something that I've learned that will make you more successful and eliminate some of your workload. Do you have a few minutes now to talk about a new strategy to achieve your yearly goals with less effort, or are you in the middle of something?" Or... Another example:*

*"Tom, I'd like to talk about how we can most effectively work together and what I can do to best support you so that you achieve your goals this year. When will you have some time to discuss your sales goals and strategy to ensure you're positioned to attain them, as I don't want to rush through this important conversation?"*

Once you've positioned your intent so they feel comfortable, schedule at least a one-hour meeting (or longer, if needed) with each person on your team, now that they know the intention of the meeting and most important, what's in it for them.

**Tip from the Coach:** *Aside from developing and presenting their goal attainment plan to their manager, many companies have each independent contributor present their plan to the entire team to gather as much feedback to leverage the collective wisdom of the group.*

## Step 2: Set Intentions of the Meeting – Enroll Them In What you're doing, WHY you're doing it, and WHAT'S in it for Them to create buy-in.

Whether on the phone or face to face, you're now ready to begin the conversation. Set the expectations and objectives for the meeting.

Building off step one, before you dive into this conversation during your scheduled meeting, it's important to ensure expectations and intentions are aligned. Here's how you can do that.

*“What I want for you is to achieve the level of success and fulfillment that you want in your career. That's why the intention here is to discuss what's expected of you this year and how I can best coach and support you to make this a great year, while ensuring you achieve your personal goals, as well.*

*Together, we can develop ("or review" if they've already created their plan) the strategy for you to achieve your goals/KPI's on the scorecard with more certainty and with less stress, while honoring your priorities and personal goals.*

*And during the review, I'd love your feedback and what you've observed around my management style, so that I can also be mindful of what I can improve or work on. okay?”*

### Step 3: Create Alignment Around Each Goal

Once you have confirmation, move forward. After all, who wouldn't want to achieve what the manager laid out in Step 2? If you hear a "No," which will be rare, just ask, "Can you help me understand why?" so that you can uncover the root cause of this reluctance. Chances are, there's either an assumption or a bad experience behind it.

Otherwise, discuss the set goals. Be mindful of the difference between the non-negotiable company goals and each person's individual goals, which could include getting promoted, making a certain income, buying a house, saving for retirement or other personal goals. This way, you have a better understanding of how to create alignment between the two. Here are some questions to ask after setting intentions.

*"To ensure we're both aligned around what's expected of you this year, and uncover the areas where I can best support you, can you walk me through your goals?"*

This will help you assess what's expected, and ensure their goals are measurable, specific, and have a deadline associated with each goal. When discussing personal goals, I would suggest the long-term goals not stretch beyond one year, as I find that when people start setting 2+ year goals, the goals move into their vision statement, rather than a manageable goal with a clear deadline not too far in the future. This builds further accountability, focus, direction and alignment between personal and professional goals.

1. How do you feel about your goals and business objectives?
2. Why is this goal so important to you? (For those goals that are assigned to your direct reports, tie them back to how these goals would have a positive impact on their career while enabling them to attain what's most important in their life. If it's a personal goal, this question is also appropriate.)
3. How confident are you about achieving this goal?
4. Why? What's making you feel that way?

(If you sense resistance to goals sanctioned by the company, or hear excuses as to why someone feels they won't be able to attain their goal, here's a talk track to use.) *"We can either focus on the things that we can control or the things we can't. I'd rather focus on the things we can control so that you can achieve the goals, okay? So, what are the things that you have 100% control over that will enable you to achieve your goals?"*

**Mindful Moment:** There are only three things in life we have 100% control over. Our attitude, actions/behavior/communication, and our reactions! Rather than focus on the things you can't control, master the things you can.

1. What are the opportunities you see for your own development that if you can improve or change, would make you more effective, productive—if not unstoppable?
2. (Implication Based Question) How would this impact you if you don't achieve your goals? What's the consequence if you didn't achieve these goals? Should you encounter any resistance to their sales goals assigned to them, implication-based questions demonstrate the personal impact if goals are not achieved. While many find the inspiration behind their goals as a daily motivator, some people don't always recognize the consequence around if they don't achieve their business objectives. Remember, if you say it, they'll resist it. However, if they say it, they'll listen to and believe it.
3. What would it mean to you if you achieved these goals (to your family, team, company, brand, career, etc.)? (personally/professionally)

## Step 4: Assess Strategy and Identify Coaching Opportunities

If there are multiple goals, walk through *one goal at a time*. For personal goals, I'd suggest no more than two depending upon how massive a goal they are. For their sales goals, here are some questions to use.

**Coaching Conundrum:** *If you emphasize everything, you emphasize nothing.*

“Walk me through your strategy for achieving each goal.” There are 2 general scenarios here. First, they come prepared with their business plan to review. Second, you co-create it with them during the meeting and share ideas & best practices. Then have them create or refine their plan after this meeting & prior to your next meeting to review it with them.

1. What do you need to be mindful of that could get in the way of achieving your goal?
2. What's your **opinion** on how to handle each of these potential roadblocks you mentioned? (Everyone has an **opinion**. Remember, an *opinion* is different from a *solution*. Opinions aren't wrong or right. Seek to understand theirs **first**, without judgement, **before** you share your opinion. **Now** you know what they know, and know what they don't, so that you can fill in the gap and avoid redundancy.)

“What's the first thing you need to do to start working towards achieving this goal?” (Goals can be overwhelming. Start with one step at a time. As mentioned above, give each person the time and space to create a strategy for each goal, and identify the skills, and daily activity needed to achieve them.)

**From the Sidelines:** *When it comes to their sales or sales management goals, Coach the Message! The Big Miss for managers is stepping over the myriad of opportunities to coach the message, talk track and communication, whether spoken, through body language or written. Like coaching is the language of leadership, it's also the language of selling.*

The next few questions focus on *business development*, should this be a core responsibility of your sales team and a necessary part of your conversation. Notice how these questions coach the HOW - the message, **quality** of activity, strategy and talk tracks they would use, which makes the difference between the A and C player.

**Coaches Corner:** *Sales Champions don't always do different things. They just do things differently.*

1. Walk me through your strategy for business development (acquisition/client retention/client service)? What techniques will you be using (social media, cold call, warm call, referrals, cross-selling/up-selling into customers, calling on accounts, territory management, etc.)
2. What would your initial approach look/sound like?
3. Share with me some of the email templates you've created for your prospecting campaign.
4. What would the conversation **sound like** when you speak to new prospects? How will you open every conversation?
5. What is the actual message you're going to deliver when you approach your existing contacts/customers and ask for referrals (into other divisions of the company)?
6. What information do you need to know about every prospect you speak with to assess if they're a fit?
7. What are the questions you are going to use to qualify each new opportunity?
8. When you hear XX objection, how would you respond? (Take the time to work through their responses to ensure they can effectively defuse the potential objections they'll encounter.)

**Then, continue with the following questions around their specific goals:**

1. What resources, skills and attitude do you need to achieve this goal?
2. Who else do you need to collaborate and be aligned with, both internally in our company and with the customer, in order to achieve this goal?
3. What else is needed to ensure you're engaging in the right daily activities that will enable you to achieve your goal?

**Tip from The Coach:** *If they aren't sure, consider this. At this point, you've identified their goal, responsibilities, strategy and activity. **How** they plan on achieving their goals will be a next step in this conversation, to ensure we're moving beyond **what** the goal is. You've also uncovered their communication and messaging strategy via presentations, cold calls and emails/written communications that will support their goals and business objectives.*

## Step 5: Own Your Day – Create a Highly Effective Routine

Are you coaching your team on **time management and personal productivity**? This is another big coaching opportunity managers blindly miss. And they do so because they too, struggle with time management!

**Coaching Conundrum:** *If you want a great life, schedule one. Otherwise, you're living from a place of reaction rather than intention, and your day will own you, rather than you owning your day.*

How often do you take the time to review their weekly schedule to ensure every activity needed to achieve their goals are blocked out? All roads lead back to time and [self-management](#). That is, on a daily basis, what are your people focusing on activity wise, and learning throughout the day?

Does every salesperson have a well-crafted routine that resides in their CRM or calendar that identifies the specific and measurable activities they need to engage in throughout each day, which will move them closer to their goal, while honoring their personal priorities? Or conversely, do they work in a reactionary mode, jumping from one problem or task to the next, allowing distractions to overcome them, preventing them from honoring their daily activities?

**From the Sidelines:** *If you don't have the appointment, you don't have the commitment.*

**Time management** now becomes one of the most powerful coaching opportunities so that you can help them create a highly effective routine. The advantage now for you and your team is, you can use each person's routine to hold them accountable to what they committed to. But keep in mind the law of reciprocity. To build trust and a deeper sense of collaboration and commitment, you must also give your direct reports and your peers permission to coach you around time management!

If they're following a well-structured, realistic daily routine, the byproduct is, they achieve their goals. Conversely, if they're not getting results nor on their way to achieve their goals, then it's a safe assumption they're not following their routine and best practices around each activity, making uncovering the coaching and developmental opportunity exponentially easier.

**Mindful Moment:** *Empower your routine to hold you accountable.*

When coaching your team around time management, begin by setting intentions via enrollment, then use each person's routine/weekly calendar as a guide. Reviewing their schedule together makes it much easier to recognize the gaps in their routine which could lead to poor or inconsistent performance, including the non-negotiable activities and tasks that need to be scheduled to accelerate their productivity while honoring their personal priorities.

**Here's a short coaching talk track to enroll them on being coached around time management.**

*“Mary, what I want for you is to feel that you are as productive as you can be each day, so you can experience a greater sense of daily accomplishment and feel good about what you've achieved while honoring your personal priorities, without the stress or overwhelm. Time management is something I'm working on myself. This way, we can support each other to achieve what's most important to us by ensuring we're focused on the right activities that would bring our goals to fruition. Would you be open to having a conversation around how we can be each other's accountability partner, starting with reviewing our weekly routine?”*

1. Can you please walk me through how you manage your day? (Can you share your calendar with me?)
2. How do you go about making the time to focus on your priorities?
3. What would you like to have more time to do each day, personally and professionally?
4. What if anything, gets in the way of consistently honoring your calendar and commitments?
5. What needs to change in order to honor all of your commitments and priorities?
6. How can we hold each other accountable to honoring our routine? What would that look/sound like?

## Step 6: Uncover Motivation and Build Personal Accountability

To get people inspired and motivated around what may feel like an insurmountable goal, it's essential to *tap into their individuality*. Rather than make costly assumptions around how people want to be coached and supported, as well as what inspires them, uncover what uniquely motivates each person, which also includes how they want to be managed, motivated, as well as how they want to be held accountable around their goals and commitments.

**Facilitate this conversation using the following questions:**

1. What are the parts of your goals and your job that you're most excited about?
2. What motivates you to come to work every day?
3. If you didn't have to work, what would you do with your time?
4. How do you like to be acknowledged for a job well done?
5. What skills would you like to develop that would advance your career?
6. Who are the people you need to develop a better relationship with this year to reduce problems or breakdowns and achieve greater results?
7. Other than me, who else do you have or who do you need to rely on internally who can help you achieve your goals?
8. What kind of personal brand do you want to create? What do you want people to say about you? How do you want to be known?
9. What additional value would you want to contribute to the team and to the company that we haven't discussed?

**From the Sidelines:** *If you're struggling to come up with the answers to these questions on your own, you're asking the wrong person! Ask your people, since they're the only ones that know the answer. Otherwise, the facts will be overshadowed by costly assumptions.*

**Here are a few additional questions needed to build further accountability around their role and goals.**

Remember, *if they create the rules, they own them*. You're now just honoring them and never have to worry about being the big bad manager!

**Mindful Moment:** *People often resist what they hear but believe what they say.*

1. How do you like to be managed and supported so that you can achieve these goals?
2. How can I hold you accountable (be your accountability partner) around your goals in a way that will sound supportive rather than negative?
3. How do you want me to approach you if you don't follow through with the commitments you make? What would be a good way to bring this up?

## Step 7: Schedule Next Steps and the Coaching Cadence

Debrief and discuss next steps around executing on their business/sales plan to build ongoing momentum and accountability.

Finally, before concluding the meeting, take their pulse and gauge their reaction and feelings around the conversation.

1. So, how are you feeling about our conversation?
2. What's standing out most for you?
3. What new opportunities are you most excited about?
4. What concerns, if any, do you have moving forward?
5. To reconfirm next steps, what are you going to be working on next?
6. Let's go ahead and schedule our next meeting to review your final sales plan, and create a coaching cadence that will work best for you.
7. What are you willing to commit to having completed by our next meeting?
8. I'm looking forward to working with you so that you can achieve your goals this year!

# Time to Take Action and Enjoy the Process of Achieving Your Goals!

**Coaches Corner:** *The answers you get are only as good as the questions you ask. Give each person the time to hear, process and answer each question in a way that works for them; not you.*

The conversation I've outlined here is **the most important conversation** to begin a new selling year, or something you can discuss anytime, as it will make the difference between goal attainment and failure. You're probably familiar with this truth. *If you fail to plan, you plan to fail.*

Don't rush this conversation. **Be patient.** Give each person the time to self-reflect so they can gain valuable perspective on where they are now and where they want and need to be.

When asking these questions, make sure they answer your questions completely. Listen deeply to their response so that you're crafting relevant follow up springboard questions based upon what you hear.

Remember, some of these questions are questions you've never asked them. Additionally, many of these questions are ones that your direct reports have never been asked their entire life! That's the exciting part about coaching; the creation of entirely new possibilities that you and your direct reports never imagined.

I would suggest printing this conversational blueprint out or ensuring it's in front of you to ensure you follow this conversational coaching strategy. I'd even suggest showing your directs this strategy, **since transparency and vulnerability build trust.**

As a manager, it's critical that you respect their process of self-discovery. Outside of daily coaching and regularly scheduled coaching sessions, it's also best to do courtesy check-ins each week with your team to demonstrate your support as they're working through their process of attaining their goals. Schedule more time if needed, as well as a follow up meetings to finalize their sales success plan for the new year to continually fuel their momentum.

After effectively facilitating this conversation, you and everyone on your team will have a greater sense of confidence, trust, focus, even a sense of excitement! Developing this collaborative, aligned environment, laser-like focus and strategy around shared, unified goals will ensure you create the most successful, breakthrough year yet for your company, your team and yourself.

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# SALES LEADERSHIP COACH TRAINING

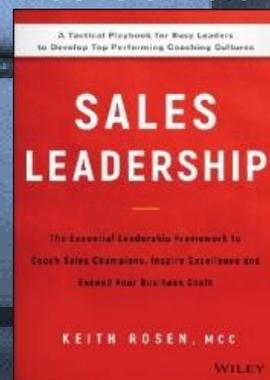
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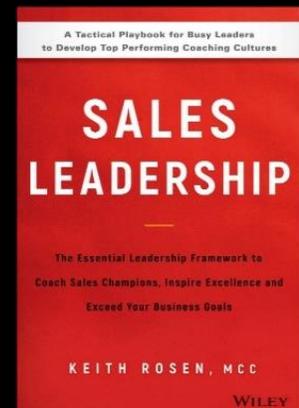
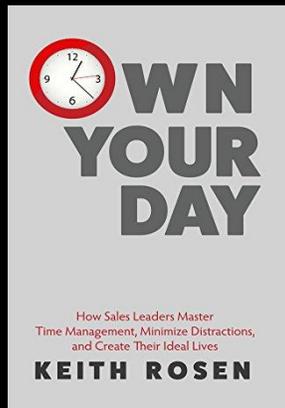
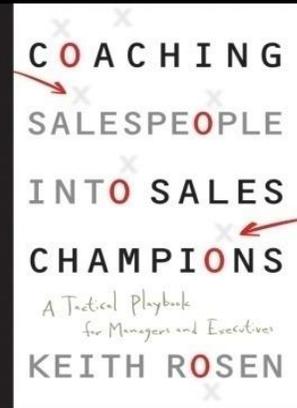
**Master the Skill and Habit of Coaching and  
INCREASE Sales at least 17%, Reduce Your Workload, Turnover and  
Create a Unified, Accountable, Trusting Coaching Culture & Sales Champions**

Do you follow a coaching framework daily to ensure effective and consistent coaching so that your sales team can confidently achieve sales goals - AND you have the MEASURABLE results to prove it?

If you haven't mastered the, habit, skill and language of leadership, which is COACHING, then in EVERY conversation, you're WINNING a selling opportunity or destroying one. So, stop wasting money on more technology and sales training because sales training doesn't develop champions. MANAGERS DO.

**The only way** to develop an accountable, self-motivated team and ENSURE goal attainment is by learning how to effectively LEAD and *coach your salespeople into sales champions so you can resign from the timely role of CHIEF PROBLEM SOLVER.*

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