

# Pillars of a Coaching Culture

**For years, sales management has been driven by a desire to achieve better results.** We've been implementing the same management tactics, motivating people with money and fear, trying to manage outcomes with deal reviews, and forecasting – and then wondering why we struggle to deliver consistent results.

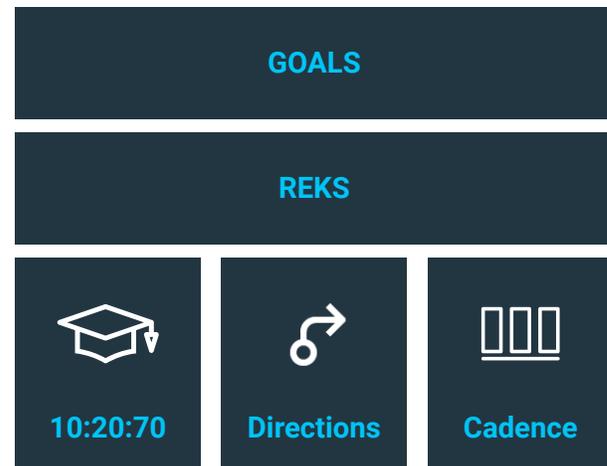
When we look at high performers in other fields like sports, the military, arts, and academia, what becomes clear is that success does not come from talent on its own.

**Success comes from deliberate practice.** With a defined process and accountability, combined with caring about the individual and building trust through the candid conversations, we can achieve amazing results for sales professionals, on both an individual and a team level.

Start coaching by building a culture of learning and development. Provide sales professionals with the tools, process, and environment to make the difficult behavioral changes required to succeed in the ever-evolving world of sales.

The fastest way to improve is by eliminating your weaknesses rather than optimizing your strengths.

Becoming a coach with a selfless style of management will give you the skills to enable your team and empower them to succeed. As a coach, you will lead your team through **why** each goal is set, **how** to build those skills to reach their goals, and **what** skills it will take to achieve those goals.



Pillars of a coaching culture

## ▶ Pillar 1: Establishing Goals - Starting With Why

Asking “why” will help people understand the long term by aligning their motivations with business motivations.

The traditional learning framework is broken. Adults don't learn best from lectures, and one-time onboarding courses don't stick (more on the 70/20/10 learning framework in Pillar 3 later).

Sales can be a challenging pursuit, with many obstacles and objections along the way. As a manager, you may need to help your sales professionals articulate their personal motivations, so they have a clear understanding of what they're working towards.

## ▶ Pillar 2: Coaching Framework - REKS

With clear goals, we need to create a clear path to success – one that isn't just looking at the end goal but all the elements required to achieve these goals. Use the REKS framework shown here at right, to create that path.

Understanding the REKS framework helps visualize a clear path to success for sales professionals, and also provides a framework for collaborating with your team. Everyone agrees to clear coaching principles, like how you should communicate with each other if goals are being missed or achieved, and whether skills are present or not being implemented.

### REKS

**Results:** The specific and measurable outcome of efforts. Depending on the role, these can include discovery calls, meetings, opportunities created, deals/revenue closed, QBR/Impact Review calls, or renewal conversations.

**Effort:** The defined specific and measurable activities that lead to the results required. This can include calls made, emails sent, social messages sent, events attended, leads converted, and any other input activities that are leading indicators to results.

**Knowledge:** The formal knowledge such as the sales process, product knowledge, persona profiles, industry context, and recognition of compelling events that are a catalyst for your product or service.

**Skills:** The core skills necessary to execute on the knowledge. This can include the ability to run a discovery call, run an effective demo, handle objections, write a compelling email, or trade during the close phase.

## ► Pillar 3: Learning Science

In contrast to what most of us have been led to believe, science shows that only 10% of learning happens in a formal setting like classrooms, videos, and books, while 20% is through observing peers, and 70% comes from actually doing the work.

Adult learning science has shown us the importance of on-the-job learning. Without structure, this crucial learning opportunity is lost, which is why creating a coaching cadence is essential.

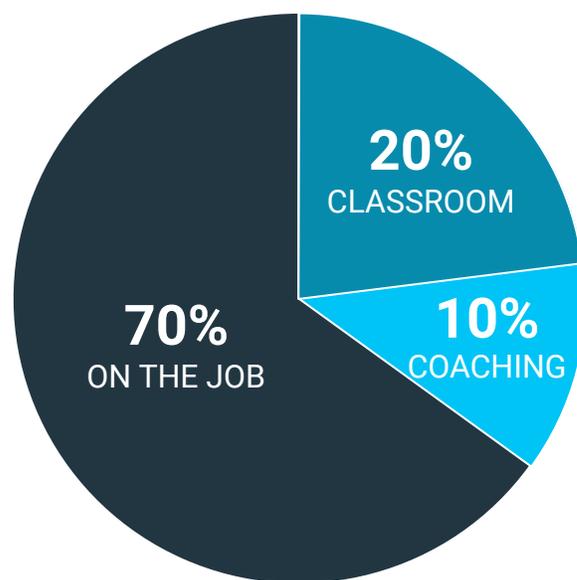


Figure 2: The 10-20-70 Learning Model

## ► Pillar 4: Coaching Cadence for Deliberate Practice

There are two main elements of coaching:

(1) **Performance**, or traditional management and 1:1 coaching situations that arise to help drive short-term results

(2) **Development** sessions, in which the manager acts as the coach to empower the team to contribute to a sales professional-driven, continuous coaching culture.

Performance	Development
Traditional 1:1 relationships are manager-focused, drilling into the forecast and past results, while looking to help on specific deals that “move the needle.” This is all focused on the goals of the manager, not the goals of the sales professional. Instead, a coaching cadence provides opportunities to identify the sales professional’s “why,” understand gaps in their knowledge and skills, and help them to conduct the actions to achieve results. Manager-led cadences incorporate 1:1s, team stand-ups, territory planning, personal goal setting, and career development.	Many managers see themselves and their L&D team as the bastions of knowledge for their sales professionals. This creates a bottleneck in their sales professionals’ development, and causes them to miss out on peer-led learning opportunities.  To harness the 10:20:70 principle of learning science, you need to create a structured, safe environment for sales professionals to share feedback and learnings from using their skills.

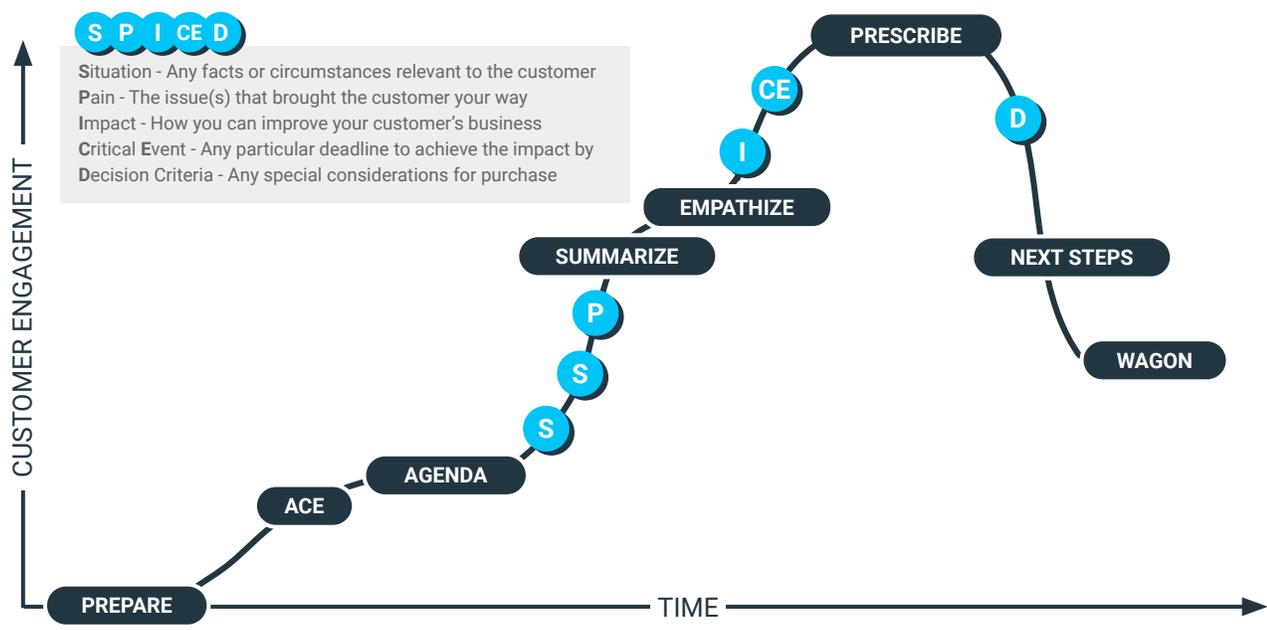


Figure 3. Example of a Diagnose Blueprint

## ► Pillar 5: Provide Turn-by-Turn Directions

As we master new skills, it's important to understand the foundation those skills are based upon. Having sales professionals memorize scripts for complex conversations is not a good long-term strategy.

By providing turn-by-turn directions, you're arming your team with frameworks that apply to many different situations. They can use these to continue to guide them each time, instead of being stuck with what worked one time, only to fall behind when the world changes or something unusual happens during an interaction.

A **blueprint** is an example of the fundamental skills that go into a framework, along with some clarity on why the framework exists and what you can do to improve upon it.

Although every customer conversation is different, there are common characteristics that are clear indicators of a successful interaction through any style of communication (e.g. email, phone call, or in-person).

Without a blueprint, many coaching conversations are guided by the coach's previous experience, making the feedback subjective and unactionable. By working from a blueprint, both sales professionals and managers can provide objective feedback, free from prejudice and ego. This turns a previously "artful" process into something scientific and data-driven.

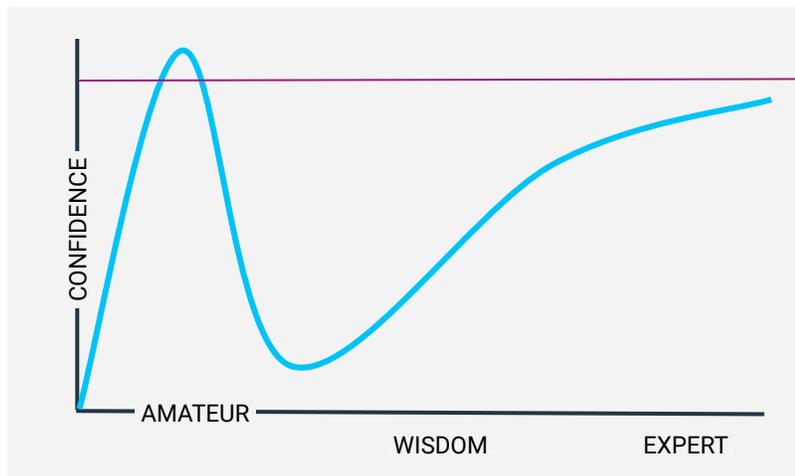


Figure 4: Amateurs typically overestimate their ability above expert level

## The Dunning-Kruger Effect

Coaching is critical to improvement. The Dunning-Kruger Effect, first published in 1999, suggests that poor performers are not able to recognize their shortcomings in their performance because of their inability to recognize nuance like a true expert.

In fact, amateurs are often more confident than experts in their ability to perform a given task. For example, over 80% of drivers self-categorize as "above average" when statistically this is impossible.

All professionals are susceptible to the Dunning-Kruger effect. As one becomes more experienced and competent at a given task, their wisdom usually leads to the realization that there is more to learn — even things they don't know that they don't know.

The best way to avoid overestimating your ability is by having an expert review your work in real time or through video recording, and getting structural feedback based on a repeatable process.

## ► Pillar 6: Consistent Commitment and Accountability

The biggest barrier to having an impactful conversation is creating a safe environment where sales professionals and managers can provide the feedback required to improve performance.

Feedback should be honest, transparent, and delivered in a professional manner that doesn't feel like an attack. This builds trust and requires a thoughtful approach where both parties feel respected and invested.

Trust is something that is earned over time by consistently completing your commitments (for example, by arriving on time and prepared for 1:1s and coaching sessions). Leveraging blueprints to enable feedback that's focused on process and execution, rather than subjective experience, can rapidly accelerate the adoption of a coaching culture.

Now that you've been introduced to the pillars of coaching, the remaining manager blueprints are going to give you the tools and skills to implement your own coaching culture.

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# How to set up a RingRing Role Play (SSSS)

*“We don't rise to the level of our expectations, we fall to the level of our training.”*

ARCHILOCHUS

## Three Types of RingRing

### Team

Roleplay situations where the coach is also included so the team can “figure it out together.”



### Coached

Letting the team coach each other. Ensure they first focus on mastering the process, then discuss execution and intent.



### Peer-to-Peer

Set up your team to practice with each other on specific exercises; perform several sessions until the skill is mastered.



Most knowledge is measured with a test, but since sales is a performance-based function, roleplays are a great tool to perfect skills and check for any skill or knowledge gaps.

## Mindset

“But everyone hates roleplays!” Making roleplay a positive and exciting coaching model, instead of something your team dreads, is a common challenge. As a coach, the goal of roleplays is to help your team implement skills and enable them to succeed.

If you practice a skill within a realistic scenario, you’re more likely to be able to implement that skill when the time arrives in real life. This is where the idea of the “RingRing” exercise comes in; you’re changing your mindset to that of the customer who would pick up your phone call.

Here are the principles behind a successful RingRing:

- Coach on something specific — focus on one skill at a time. Keep it simple at first, then build complexity as the team improves.
- First, give feedback on the process. Once that is mastered, move on to critiquing execution.
- Once they begin to see progress, the team will love using this method.

RingRings should be recognized as more challenging than a customer conversation, because you’re performing them in front of your peers. Celebrate the person’s efforts when they do an amazing job in a RingRing!

## The SSSS Framework in Roleplays

Before you go into a roleplay, make sure you mention **why** you're practicing the skill first. If you're teaching someone the power of a structured call opening, it's important to make this relevant by describing how many meetings fail because customers don't know what to expect, or because the goal of the call is unclear.

### ► Skill

Start with a brief re-introduction to the skill, and be specific and clear on what you're practicing. For example, if you're roleplaying the opening of a scheduled call using the ACE framework, you or a proficient student would first demonstrate what a good approach looks like ("I appreciate you joining the call today. We have 30 minutes scheduled. Does that work? The end goal of this call is to align your requirements with a potential solution; does that sound right?")

- Clarify the correct process before asking someone to practice it. It's much easier to teach someone the correct process from the start, rather than asking them to unlearn bad habits.
- A common mistake is taking on a complex process and testing all facets of it at once. For example, roleplaying an entire unscheduled call is often counterproductive if the fundamentals have not been mastered. There are too many potential scenarios.

### ► Scene

To help your team thrive in roleplays, have them visualize the situation in which they would use the skill. For example, ask "When was the last scheduled call you had? What was the customer's name and title?" Basing the roleplay on a real person, rather than a hypothetical scenario, increases effectiveness.

- Ask three to six people on your team to stand up in a circle. If you're practicing via video, have everyone turn on their camera.

## ▶ Setup

There are three roles involved. Roles will rotate after each RingRing. For this example, we'll use names:

- Casey, the coach: This is the person helping set up the roleplay and giving feedback at the end.
- Sam, the sales professional: This is the person demonstrating the skill.
- Alexandra, the customer: This person is acting as a real customer.

**Timing:** The RingRing exercise should be less than 90 seconds long to maintain momentum and give everyone a chance to practice.

The coach should make it crystal clear what the process will be once the RingRing starts.

### Setup Example - The coach will say:

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- 1 Alexandra, you will be the customer, and when we start, you'll pick up the phone and say, "RingRing...this is Jill, VP of Sales".
- 2 Sam, you will be the sales professional. As soon as Jill picks up the phone, please start with "I appreciate..." then go through the rest of the framework.
- 3 I'll be the coach and give any relevant feedback at the end. Any questions before we start?
- 4 Okay, Alexandra, take it away with a "RingRing..."

A common mistake is making the roleplay too open-ended. If you set it up by saying, "Okay, roleplay an ACE," the sales professional may ask questions about what kind of call it should be, who it's with, etc. This is a waste of time. It's much better for you to be prescriptive and specific.

## ▶ Start the RingRing

It's important to keep the momentum moving. If things derail, or something funny happens, it's perfectly fine to have a quick laugh, but then get everyone back on track. As a coach, take notes on specific word choice and key moments so that your feedback is specific and actionable. Don't rely solely on your memory.

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**Alexandra** "RingRing... this is Jill, VP of sales..."

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**Sam** "Hi Jill, this is Sam. Thank you so much for taking the time, really really awesome of you. We have 30 minutes scheduled; does that still work?"

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**Alexandra** "Yes, that's great"

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**Sam** "My goal of this meeting is to show you our amazing platform and set up a demo, does that sound good?"

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**Alexandra** "Ok..."

## ▶ Feedback

**How you give feedback is the most important skill you will teach your team. Lead them by example.**

There were two major flaws in Sam's RingRing. The first issue was that Sam said "thank you" instead of "appreciate." The second was the "end goal" – it was about Sam, and not customer-centric.

### **1 Process: Focus on the process first before offering any opinion on how it went.**

*Casey: "Sam, great job implementing the ACE. You started off thanking Jill for her time, then checking the end time, then going into the end goal. The process was there."*

### **2 Execution: Then give feedback on execution.**

*Casey: "Sam, your intent was correct in starting off with 'thank you' but to help form a pattern so it becomes something you don't even think about, it will be better to use the word 'appreciate.' After you've done it 20-30 times, then you can go back to 'thank you' since your brain will have already mastered the pattern. Does that sound fair?"*

#### **Intent matters more than execution**

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*Sam's intent was to do the right thing, so don't go on and on about how he messed up. Once he nails the process, then you can focus on the other issue of "my" end goal vs. the "customer's" end goal. You will have another coaching moment to focus on the end goal with the next student.*

## ▶ Coach the Coach

Once the first round is complete, pass your coaching duties on. In this case, reward the sales professional for going first by asking them to be the coach. Then Alexandra will switch from the customer to the sales professional, and another member of the team can be the customer:

- 1 The peer acting as coach sets up the next RingRing and gives feedback first.
- 2 When they are done giving feedback, help them take the emotional or qualitative feedback out of it by focusing on the process first.
- 3 Guide them to first focus on whether the process was followed, then choose one thing they would improve on.
- 4 Ask if anyone else noticed anything.

Once the second round is complete, rotate roles and keep practicing the skill until everyone has proven they have mastered the process.

Empower your team to give each other feedback by using all three roleplay coaching models: team, coached, and peer-to-peer.

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# BINGO CARD Consultative Selling

<b>OPEN MEETING</b>	<b>A</b> ppreciate	<b>C</b> heck end time	<b>E</b> nd goal	Agenda	Ask "what else"	Summarize previous call or research
<b>SPICED</b>	Establish <b>S</b> ituation	Identify <b>P</b> ain	Prioritize their pain	Share use-case story	Identify <b>I</b> mpact	Uncover <b>C</b> ritical <b>E</b> vent
<b>WAGONS</b>	Summarize <i>Did I get that right?</i>	Client says "that's exactly right"	Ready for next step?	Schedule Follow Up	What do you want out of next step?	Ask if others would benefit to join next?
<b>TALKER</b>	<b>T</b> one of voice	<b>A</b> sk questions	<b>L</b> isten & mirror	<b>K</b> eep notes	<b>E</b> mpathize	<b>R</b> epeat

# BINGO CARD

# Strategic Selling

<b>PROVOKE</b>	Current <b>S</b> ituation & <b>P</b> ain	Research	New <b>S</b> ituation	Rational <b>I</b> mpact	Emotional <b>I</b> mpact	<b>C</b> ritical <b>E</b> vent
<b>STORY TELLING</b>	<b>S</b> ituation - Make it Personal	Negative <b>P</b> ain	Positive <b>I</b> mpact	Relevance to the client	Emotional, Rational and Quantifiable	Customer as the Hero
<b>DECISION PROCESS</b>	Decision Criteria	Prioritize with stakeholder	Options	Rank	Determine <b>I</b> mpact	Use of <b>I/CE</b>
<b>TRADE</b>	Trade List	Qualify Decision Maker	Get all asks out	Repeat what you've heard unemotionally	Expiration Date & Consequence "Sound fair?"	"That Changes the Deal"

# How to Conduct High Impact Coaching

*An amateur practices until they get it right. A professional practices until they can't get it wrong."*

UNKNOWN

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## Mastery Takes Time, Effort, and Multiple Failures

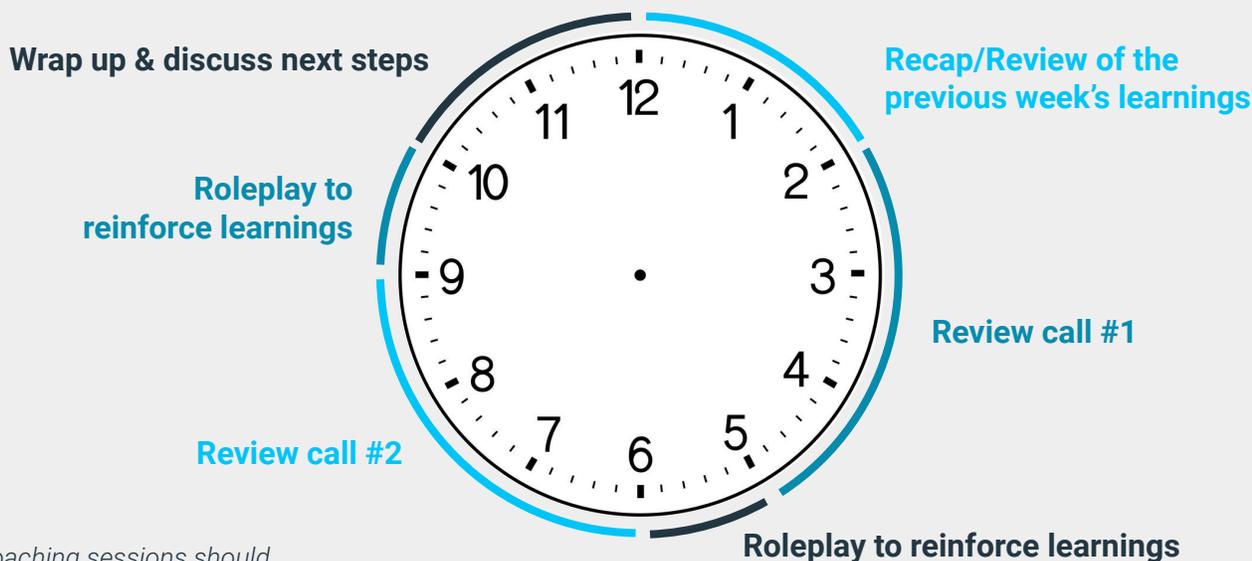
Managers often wish they had more time to dedicate to coaching. "High Impact Coaching" is a way to maximize your time together as a team in order to focus on skills development in a shorter time frame.

The following are key to successfully implementing high impact coaching at your organization:

- Transition early learnings by reps into consistent behavior with customers
- Create a culture of coaching for continual improvement and accountability
- Build the coaching muscle so that what seems hard now will become easier and more repeatable later



## Timeline of a Single Coaching Session\*



\* Coaching sessions should typically last 60 minutes

### ► Call Reviews with Peers

Reviewing calls in front of the group taps into several positive coaching techniques. Reps should take pride when you show off how they've been successful in implementing the process in a real call. If you need to coach someone up, call recordings are an objective way for them to see the gaps in how they're executing, without being confrontational.

**The key is making it fair, transparent, and actionable.**

Private 1:1 call reviews between the coach and rep should be reserved for egregious errors that are not appropriate for the rest of the team to hear (e.g., vulgar language, lying, or other inappropriate behavior). Everyone should have a turn and know when their call will be reviewed ahead of time.

High impact coaching works so well because it taps into every element of the 10-20-70 learning model. At the beginning of the session, you refresh on the process (10% formal learning), then you observe your peers implementing the process (20%), and the final 70% is spent performing the process on a real customer call or in a roleplaying exercise.

## ► High Impact Coaching Steps

### STEP 1

#### Listen to the calls prior to the coaching session

Identify coaching points you can use to engage the group in a discussion and target particular skill sets. Note: Timestamp the call ahead of time to save time finding the teaching moment. Best practice is to have your team submit their recordings with their own timestamps.

### STEP 2

#### Engage the group

The session will include discussion, comments, feedback, and learnings from the team. Use the coaching points you identified earlier to direct the conversation toward the session's learning objective. When you're listening to the call, ask everyone to take notes as if they are the rep on the call. Let them know you will call on someone after the call to summarize.

### STEP 3

#### Use coaching techniques to highlight learning objectives

<b>Process, then Execution</b>	Ask the team which principles were used on the call. For example, which questions were open-ended and which were close-ended? What unique words can we mirror? Was there anything unusual about the customer's tone?
<b>Pause</b>	After the coaching opportunity, pause to ask the team coaching questions like "What do you expect the rep to do next?"
<b>Practice</b>	Use a RingRing exercise in front of the group or perform mini-breakouts where everyone splits into groups of two or three.

### STEP 4

#### Share the focus among the group's calls

Everyone needs to be able to diagnose where there's an issue and prescribe a solution in a group environment. In a one-hour small group session, there should be two or three calls that are reviewed along the same theme.

### STEP 5

#### Engage the group

At the end of the session, provide clear action items for everyone. We are our own harshest critics – leverage that with a follow-up exercise. Have everyone submit a self-reviewed call with timestamps that highlight improvement or mastery of the key learnings of the day, and set up the topic for the next call review session.

## ► Conclusion

High Impact Coaching often feels daunting for the person sharing their call, but with the right prep and organization up front, your team will be asking you to review their calls in front of the group.

### Best Practices



- DO** Keep it positive. This is constructive coaching – heavy focus on “constructive.”
- DO** Limit feedback per person to one or two items; any more and the receiver will feel overloaded.
- DO** Recognize that it isn't easy being vulnerable in front of your team.
- DO** Offer valuable insights into the call.
- DO** Ensure that everyone is taking notes.



- DO NOT** Provide broad, non-actionable feedback like “You didn't sound confident.”
- DO NOT** Refer to how well you've done it. Provide examples and use storytelling to show how others have been successful.
- DO NOT** Take advantage of people's vulnerability.

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# Structuring a Coaching Cadence

*“Give me six hours to chop down a tree, and I will spend the first four sharpening the axe.”*

ABRAHAM LINCOLN

Leaders set the tone for a positive culture. The best leaders create a dynamic where their direct reports grow through self-reflection. Coaching is a type of leadership that involves asking questions to help others achieve their potential.

Asking the right coaching questions creates a learning session. It gives someone who is busy yet skillful the space to examine themselves and see their actions from a different perspective. They are often able to envision a new solution to an old problem.

Begin by planning out what you'll focus on during the coaching session. Showing you have prepared and have specific objectives in mind will show your team that they should also come prepared to maximize time and learning opportunities.

## **The goal of coaching is to identify:**

- 1) Motivation
- 2) Skill level
- 3) Current developmental level and goals
- 4) Process to help achieve those goals

This blueprint will teach you the four key steps to structuring a coaching cadence.

**STEP 1**

## Adopt a modern coaching mindset

**Historic Style of Leadership**  
Opinion-Based

**Modern Style of Leadership**  
Lead by Example

**Emotional**

*That sounded awful.*

Judgmental feedback is often rejected. Your first reaction may not be the most helpful thing to share.

**Qualitative**

*You have low confidence.*

High-level descriptors are hard to interpret.

**Specific**

*Your speed of talking was faster than your client.*

Focus on the process first. Pick just one thing they can improve that will have the most impact.

**Intent over Execution**

*The goal of your opening was correct, but wordy.*

Humans are extremely perceptive to intent; focus on developing positive intent even if execution is slightly off.

**STEP 2**

## Use different coaching models to increase engagement

The historic coaching model was based on the teacher/coach/leader having all the knowledge and information. Today, the information is on the internet, and the primary role of the coach is to guide the process.

### The 8 different coaching models:

**Coaching 1**  
Training



Explaining key concepts behind the exercise and what needs to be achieved.

**Coaching 2**  
Team Roleplay



Roleplay situations where the coach is also included so the team can "figure it out together."

**Coaching 3**  
Coached Roleplay



Let the team coach each other and ensure they focus on mastering the process.

**Coaching 4**  
Peer-to-Peer Roleplay



Set up your team to practice with each other using specific exercises; perform several sessions until the skill is mastered.

**Coaching 5**  
Study



Provide a write-up on the materials to be tested, like WbD blueprints, but also TED videos. Study and test.

**Coaching 6**  
Simulate



Let the team listen to recordings of calls, critique, use a questionnaire, or have top-of-class reviews.

**Coaching 7**  
1:1 Roleplay



Roleplay out a 1:1 situation; make small adjustments and improve one skill at a time.

**Coaching 8**  
Real-Time Coaching



Coach during the call; control pace, do not overwhelm, and use a WbD real-time coaching card.

Coaching models 1-4 above are all focused on group coaching, whereas coaching models 5-8 are one-on-one work.

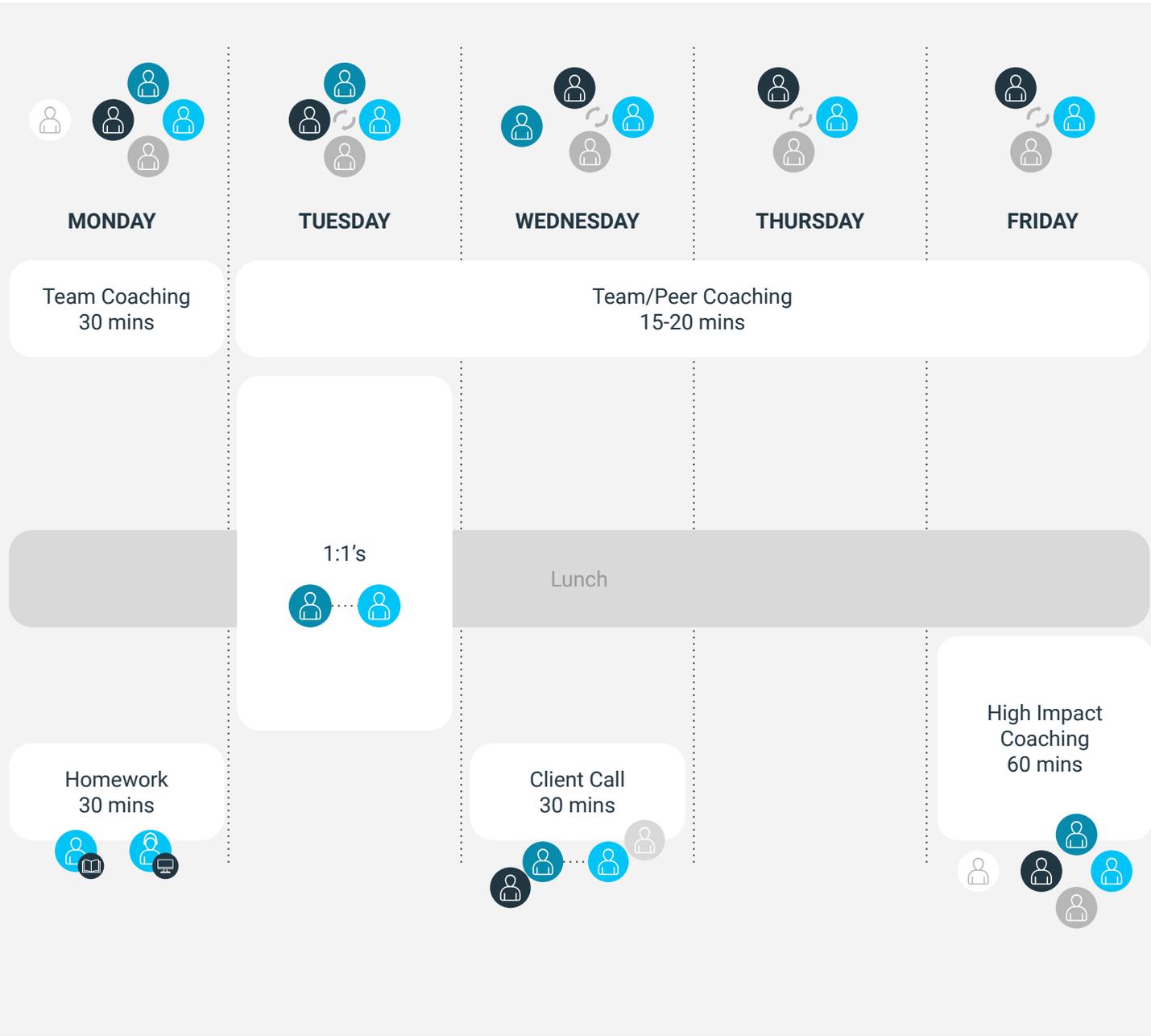
By implementing several coaching scenarios, your team will be able to optimize their mastery of skills by learning from mentors, peers, and deliberate practice.

Not all learning needs to be manager-led. Make sure the team is set up for success to practice on their own and with peers. By teaching your team how to give feedback and leading by example, you will create a positive coaching culture that will exist even when you're not in the room.

**STEP 3**

## Build a coaching schedule and apply the coaching models

Repurpose some of your existing team meetings to try out new coaching meetings. Below is an example of how to leverage different types of meetings throughout the week.



 **STEP 4**

## Map out your Quarterly/Monthly/Weekly plan

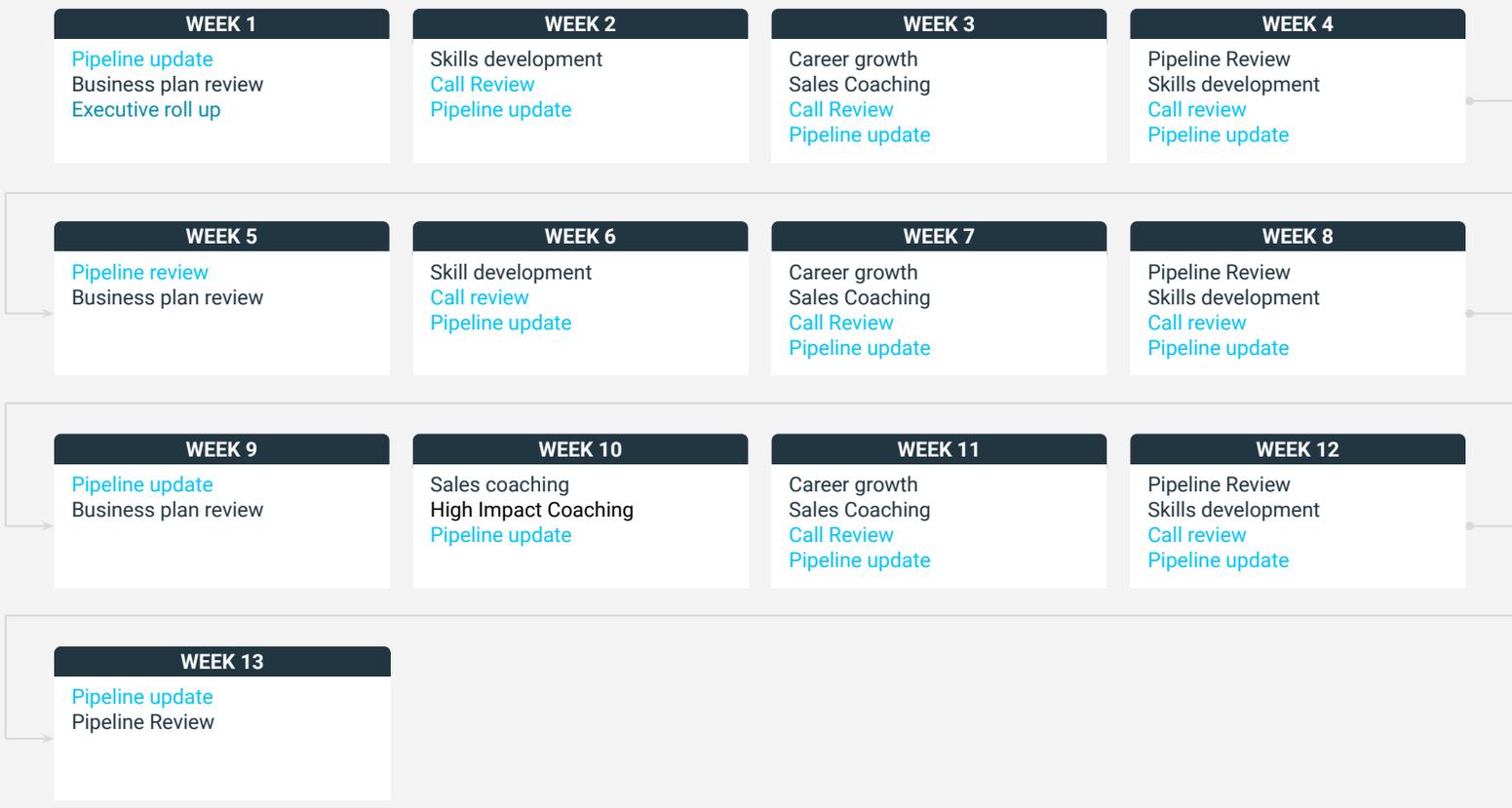
With a strong understanding of your ideal time to sell, schedule your weekly meetings on a calendar for review and allocate sales rep tasks for peer-led coaching exercises.

UCLA Coach John Wooden won 10 out of 12 years of NCAA basketball championships by implementing a philosophy of being extraordinary at executing the basics. Every season, he would start out with how to wear your socks and tie your shoes.

His reasoning was based on his principles of success – if you get a blister on your foot, it's not just that you're taken out of the game, but you let the team down.

**But he also knew that practicing the basics in the same way over and over would lead to a plateau.** According to the science of learning, the key to engaging learners is through novelty. John Wooden “tricked” his team into practicing the basics by spacing out coaching drills that would build on different skills, and practicing them in various scenarios.

The best coaches plan their skill development training over time with a path that everyone is aware of.



With a higher velocity team, consider a plan with shorter but more frequent meetings. An SDR making 20 calls a day will have lots of practice with customers to implement new skills. But a strategic AE with only one discovery call every two weeks may benefit from more infrequent but deeper case-study review sessions to help strategize.

## ▶ Conclusion

Communication with your team is key to ensuring the success of any coaching/meeting cadence. Clearly identify the objectives, agenda, responsibilities, and expectations for each meeting.

The effort of planning ahead and maximizing your training time will result in a more engaged team of salespeople that are able to help each other stay on target and grow together.

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# Great Questions Coaches Ask

***“A coach is someone who can give correction without causing resentment.”***

—John Wooden

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## Word Choice Matters

As coaches, the questions we ask and the way we ask them can change the dynamic of a conversation.

Telling someone what to do is not coaching. This only helps with one scenario at a time. Instead of a one-way interrogation, transform your conversations into dynamic learning sessions.

The ability to ask questions that lead to behavior change is an essential management technique that defines coaching. But questions only work if you genuinely care about the response of the person you're speaking with. You must figure out the thought patterns behind your students' actions to help them learn the skills and lessons you're coaching.

## ► “Why?”

Semantics make a huge difference in how your coaching questions are perceived. Be especially sensitive to the question “why?”

Why-based questions tend to make people defensive. They can often feel confrontational or judgemental. Consider questions like “Why did you offer that discount?” or “Why did you say that to the customer?”

**It’s less risky to start with “what” or “how” to explore a person’s thought process behind certain behaviors.**

Your tone also makes a huge difference when asking questions that start with “why” – and it can be a great question in some contexts.

For example, when you’re helping a customer uncover a critical event, if they say they need a solution “by January 15th,” then asking “Why is that date important to you?” is perfectly acceptable.

However, if a customer says, “I need a solution by January 15th or I’m going to get fired,” then asking “Why will you be fired?” may be inappropriate without more context.

Asking great questions in coaching is just like asking great questions in sales. Word choice matters tremendously. In *The Coaching Habit* by Michael Bungay Stanier, to get into the coaching mindset, always make sure the context is clear.

Try to guide the conversation with questions, but don’t make it feel as if the meeting is all about what you as the leader want to accomplish. If you call a meeting and you already know and state what you want to talk about, it won’t have the same impact as if you let the conversation naturally evolve. By strategically asking questions, you encourage people to stumble over the truth and realize things for themselves.

# Asking Great Coaching Questions

## ▶ The Opener

In a meeting or conversation, first impressions make all the difference. If you're not in the right mindset to deliver or receive feedback, your meeting might be a waste of time.

**When starting a coaching meeting, one of the best questions you can ask is “What’s on your mind?”**

This question is powerful because it gives just enough context as to where you want the listener to focus — personal or business — as they open up. The biggest benefit of this open-ended question is that it's less likely to cause them to fall into a passive response like the all-too-common common “How are you?” or “What’s going on?”

People ask these generic types of questions all the time, so you typically get a default answer such as “fine.” The listener answers an open-ended question in a close-ended way. This is called a conversational cul-de-sac: instead of continuing in the same direction, you end up right back where you started. Most people do it out of habit.

“What’s on your mind” is the right balance of context and concern. It's about your student and what they're thinking about, and they can choose to answer from a personal or business perspective. It helps focus the conversation on what's going on instead of having you as the coach come in with a predefined agenda (“Hey, I wanted to talk to you about XYZ”).

**“Experience is what enables us to recognize mistakes when we make them again.”**

—Franklin P. Jones

**▶ What Are the Blockers and Challenges “For You?”**

You want to ask questions that get your students to reveal any challenges they’re up against. Typical questions might include “What challenges do you have?” or “What are you struggling with?” or “What difficulties are you facing?”

These all have a negative context — that doesn’t make them bad questions, but they can’t be the only questions you have in your coaching toolkit.

Often when we’re struggling with something, we blame others, usually outsiders.

**“What is the real challenge for you?” is a more compelling question that you can follow up with.**

## What Are the Real Challenges For You?

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Adding the words “for you” is a compelling addition that gets the person to be more self-reflective, and it deters them from blaming others. Asking this question also encourages a more detailed and personal response.

Ask, “What are your biggest challenges?” and you might hear “I’m worried that I don’t have enough time to prepare for this presentation because John still hasn’t sent me last week’s report.” This blames someone else and doesn’t help your student get to a solution.

Following that up with “What are the real challenges for you?” might reveal an answer like “Without that report, I’m not able to finalize the agenda for the board meeting.” Now the real challenge of finalizing the board meeting agenda becomes the issue to help resolve, not John not sending the report.

This is a valuable follow-up question that helps identify the cause, effect, and next steps in a challenge.

This question works because when you rephrase the question to “What is the real challenge for you?” it cuts out the blame game and causes the person you’re speaking with to look inward. They might think, “Oh yeah, I’m trying to do too many things at once, and I’m letting the ball drop. Even though it’s easy to blame somebody else, I need to figure out how to re-prioritize things for myself.”

## ▶ “What Else?”

Most coaches at this stage want to jump in with advice (“Well, this is what you need to do...”). Instead, you should ask, “What else...?” Get everything out on the table, just like you would in an effective trade.

### | “What else is going on?”

Before you answer with the advice you want to give, find out what other things are causing your student’s conflict. For example, you might learn there are other challenges at play. For example, they might answer, “We just got new terms, and there are new partners to align with, and there’s a lot of other things on my plate.”

The context of these other issues might create a bigger challenge, or you might find through talking it out that some items aren’t relevant. Either way, it helps you better understand your student’s challenges and determine where you want the conversation to go.

## ▶ **Strategize: If You Say “Yes” to This, What are You Saying “No” To?**

When you do not do what you say you will do, you lose trust. This often happens despite our best intentions to accomplish a task.

Trying to align projects with different people by asking “Who can take on this project?” often leads to compromising behavior. Your teammates that take on too much may be overworked, or worse, start dropping the ball. This leads to a bad customer experience and feelings of burnout.

### | **Solve this by asking the question, “If you say ‘yes’ to this, what are you saying ‘no’ to?”**

That’s a powerful question because it forces people to realize that just because you want to do everything, doesn’t mean you should do everything.

Saying no is a potent tool. Empower your team to say things like “This is what I’m saying ‘no’ to” or “Help me prioritize.” Reward the first person on your team who says, “If you’re asking me to do this, what should I de-prioritize to get it done?”

## ▶ Simple Questions with Complex Answers

One of the hardest parts of asking great questions is coming up with them on the spot. By adding too much context, you risk a lengthier and more convoluted question. A simpler approach is often the most effective.

- **“What do you want?”** is one of the hardest simple questions to answer. This question is very challenging for most people, since we spend most of our time thinking about what’s not working instead of what we want to do about it. This simple question helps you avoid the trap of solving the wrong thing for members of your team.
- **“What would it take?”** Sometimes issues feel insurmountable, so they need a fresh take on what an acceptable response or solution looks like. As the coach, you don’t need all the answers. Sometimes the best solution is to help your team come up with many potential solutions.

## Questions to Avoid

Unlike what we learned in school, there is such a thing as a bad question. Often, how you ask questions is more important than the actual words you use. Be aware that some interpretations of your questions could have the wrong implications.

### “Does That Make Sense?”

The issue with this question is that 99% of the time, you get an answer of “yes” for two reasons. First, answering “no” might imply that the person asking the question is dumb (and you don’t want to tell them they’re not as fluent in the subject as they think). Or second, you say yes because you don’t want to admit that you don’t understand something, and you’ll just try to figure it out later.

“Does that make sense?” has the right intent, which is something akin to “Are you following?” However, because we get so many false positives, it’s a lousy coaching question.

***We have to ask it differently. "How will you use what you just learned in your new habits / techniques / behavior changes going forward?"***

When students have to verbalize back to you, “These are the steps I’m going to take...,” it shows whether what you said made sense — or whether they're not yet understanding how to apply the idea that you have been discussing.

## ✘ “How Can I Help?”

The intent of this question is positive. You want to help your students, but it also implies that you think they need help. You're putting someone on the spot and asking them to say, “I'm weak. You're strong. Can you help me out here?” Most people, especially the ones who need the help the most, will respond negatively to this question, even though they might not always verbalize it.

When you ask this question, make sure you do it with the right context, and more importantly, with the right intent. If you realize what you're saying could be misinterpreted, don't ask the question. Instead, rephrase it in a way that suggests you could guide them to a path and offer help with a specific solution.

## ✘ Advice Hidden Inside the Question

- “Do you think it would be better to show up to the meeting prepared next time?”
- “Do you think you should've asked me first?”

Coaching through questions requires that you be genuinely interested in discussing the circumstances and thought processes of your students. But when you ask a question that's really advice or direction, it comes across as patronizing and insincere.

## Ending On a Positive — Even When it Doesn't Always Feel That Way

Coaching is about changing behavior to get different results or outcomes. Being self-reflective helps you form a stronger memory when you recall information.

### ► Peaks, Valleys, and the End

People reflect on a memory at three moments: the peak (the highest point), the valley (the lowest point), and how it ends.

Imagine you put your hand in ice water for two minutes and then reflect on the experience. Then imagine you submerge your hand for three minutes in ice water and move it to lukewarm water at the end and then reflect on the experience. You would have different memories based on those two experiences.

The ending of the experience with the lukewarm water will feel much more favorable because you had that relief at the end — even though your hand was in ice water for longer.

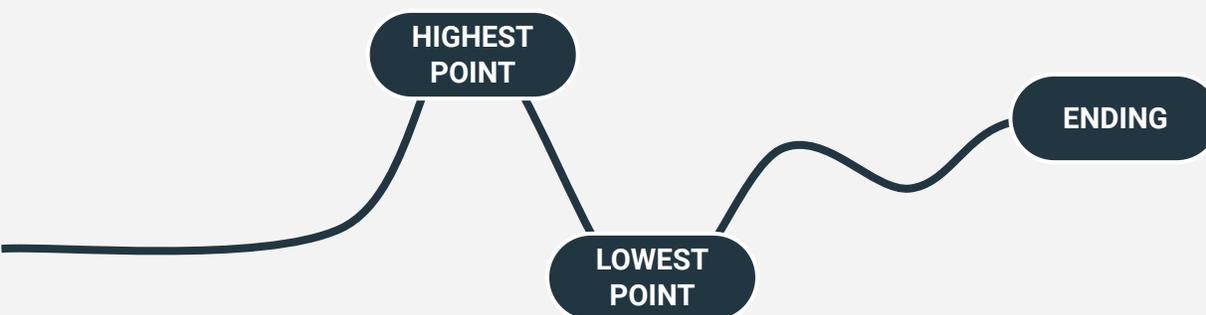


Figure 1. The three key moments that people reflect on when recalling memories

Ending on a positive note is especially important when you're having a challenging conversation or coaching session, but remember not to force your agenda on your students.

With that in mind, you might expect the overly positive “What was the best thing you learned today?” to be a good question. But when you say it like that, it’s very clear that you’re guiding your students to the answer you want. You’re implying they should say something positive... but this will backfire if they’re not feeling positive about you or the conversation. Instead, try the following:

***“What was the most useful thing you’re taking away from our meeting?”***

The key word in this question is “useful” because it strikes the right balance between neutral and a soft implication that they should keep things positive. “Useful” implies that you learned something that will benefit you. It guides the person you’re speaking with without making them feel forced into saying something nice. This type of self-reflection is an excellent segway into an agreement on next steps that will lead to accountability.

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# How to Structure your 1:1 Meeting (REKS)

## 1:1 Individualized Coaching

As a coach, your direct reports will look to you for guidance on how to level up their careers as well as their current job performance. The most loved managers are able to find the right balance of focusing on performance and development.

The secret to great 1:1 meetings is being prepared, insightful, and efficient. One of the best ways to gain efficiency is to discuss certain topics with the appropriate frequency. Routine and structure build trust, but discussing career development opportunities every week may not leave enough time to tackle week-to-week performance issues.

Vary the topics you need to cover in 30- to 60-minute meetings throughout the month. Use your 1:1s to build a customized plan to which both you and your team feel accountable.

## ► REKS Coaching Framework

**REKS** is a coaching framework you can use to help your direct reports succeed in their roles. It enables you to coach the key metrics that ultimately lead to their success. REKS stands for the following:

**R**esults | **E**ffort | **K**nowledge | **S**kills

Each rep's REKS goals should be established and communicated regularly. If changes are made to these goals, they should be clearly articulated.

## REKS Definitions

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### **R**esults

The specific and measurable outcome of their efforts. Depending on the role (e.g., inbound, outbound) these can include discovery calls, meetings held, opportunities created, deals closed, revenue closed, etc.

### **E**ffort

The defined, specific, and measurable activities that lead to the results required. This can include calls made, emails sent, social messages sent, events attended, leads converted, and other input activities that are leading indicators of results.

### **K**nowledge

Formal knowledge encompasses things such as the sales process, product knowledge, persona profiles, industry context, and recognition of compelling events that are catalysts for purchasing your solution.

### **S**kills

The core skills necessary to execute on the knowledge. This can include the ability to run a discovery call, effectively demo a solution, handle objections, write a compelling email, or trade during the close phase.

## ▶ Review

Collate and review the data for the agreed-upon previous time period, and compare performance over time.

### How to prepare:

- Obtain the required data from relevant data sources

## ▶ Analysis

Analyze the data to hypothesize any potential challenges or opportunities. Leverage the REKS decision tree (see page 4) to diagnose the rep's current performance and understand their issues:

### How to prepare:

- Leveraging the rep's data, understand the path that your conversation should follow

- 1 How does this compare to their historical performance?
- 2 If they continue on the current trajectory, will they achieve their goals?

## ▶ Agenda

Set a clear agenda for your 1:1 meeting:

### How to prepare:

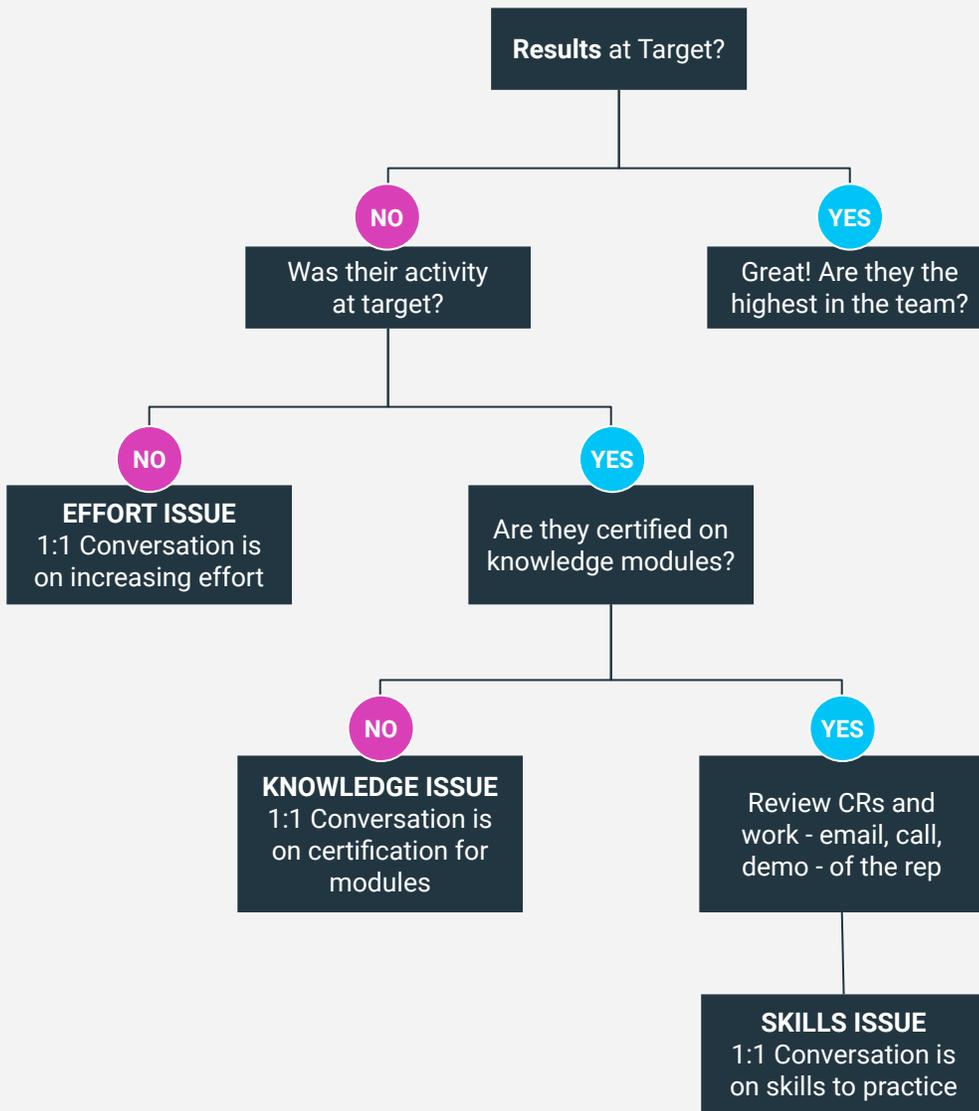
- 1 Open the meeting with clear goals and time objectives
- 2 Review the actions from last week
- 3 Discuss REKS analysis
- 4 Have growth conversation
- 5 Create an action plan
- 6 Set actions with completion dates

- Send the agenda ahead of the meeting
- Prior to the meeting, request any necessary information



# REKS Decision Tree

Leverage the REKS decision tree to diagnose the rep's current performance and understand their issues.





## ▶ REKS Conclusion

Once you diagnose their performance, ask two questions:

- 1 What are you going to do more or less of?
- 2 How are you going to do that differently?

Use the REKS decision tree as a coaching opportunity; this is not the time to tell people WHAT to do.

Follow the Socratic method and ask them HOW their actions are going to help them achieve their goals.

### How to prepare:

- Form a hypothesis of what the rep needs to do more or less of – and what they'll do differently

## ▶ Growth Conversation

1:1s can be repetitive, so you can't focus solely on the rep's performance against REKS. You need to support their career growth to build trust and enable them to succeed. Each week should have a different growth focus. For example:

**PRO TIP:** *Align the velocity of these conversations with the velocity of the role. For example, if you're in a high-velocity environment, these conversations should happen regularly. With mature field sales reps, they should be spread out over the quarter.*

<b>Week 1</b>	<b>Business plan review</b>	The rep is accountable for reviewing their previous month's performance, outlining goals for the following month, and creating a plan to execute. You should challenge the rep, clear any obstacles, and coach them toward a positive result.
<b>Week 2</b>	<b>Pipeline review</b>	The rep presents their pipeline, with the manager reviewing and challenging opportunities as required.
<b>Week 3</b>	<b>Skills development</b>	Identify any gaps in the rep's skills. Dedicate time to educating them on those gaps and building a plan to bridge them.
<b>Week 4</b>	<b>Career growth</b>	Work with the rep to define personal and career goals. Then collaborate to map their current skills and abilities against the required skill sets. Prioritize those skills and goals to create an action plan.

## ▶ Action Plan

Once a plan has been decided for REKS and growth conversations, ask your reps to identify the actions they're going to take and set realistic dates:

- **Check:** “Are these targets achievable?”
- **Ask:** “How can I help you to achieve these goals?”
- **Agree:** What happens if you don't achieve these goals in the agreed-upon time?”

### How to prepare:

- Review previous goals — what is their track record of completion?

## ▶ Commit

Once you've agreed upon and committed to goals, track them in a shared space.

### How to prepare:

- For the next meeting, ask reps to come prepared to report on their progress

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# How to Handle Candid Conversations

*“I’ve been noticing some pushback.  
What would you like to change?”*

Coaching with positive reinforcement is powerful in group settings and during 1:1s, but there will be times when you need to have direct conversations about negative circumstances.

Confrontation has an emotional component; it’s never easy giving someone bad news or constructive feedback about something that may not be taken well. Your job as a leader is to help your team to be successful. If someone is interfering with personal targets or their behavior is affecting others, it’s best to confront the situation quickly to minimize collateral damage.

## ▶ Intent Matters More Than Execution

Giving feedback is about helping the other person and achieving coaching moments that will develop them professionally. Before you start the conversation, determine your desired outcome and work out the best strategy to achieve that.

Behavior psychologists have found that any time you call someone out directly for doing something wrong, it is human behavior to become defensive. When this happens, learning or improvement is nearly impossible. Therefore, if you’re giving feedback in hopes of seeing behavior change, adjust your strategy based on a few common scenarios.

**Scenario 1 Person is open to feedback and values your advice.**

- In this scenario, help set the context. Ask questions that will help them understand and incorporate the feedback you're giving them to improve.

**Scenario 2 Person is typically open to feedback, but other parts of their work/life are causing distractions.**

- Before you deliver your feedback, ask or assess whether they are in the right mindset to receive it. Your best intentions will backfire if you deliver the right message at the wrong time.
- If they are not able to digest your feedback, find a better time instead of forcing it when it's not convenient.

**Scenario 3 Person is not open to feedback because they do not value your advice or they believe they are more of an expert than you.**

- Word choice and semantics are critical. If you attempt to deliver feedback through questions, the person will interpret this as patronizing as they "know what you're doing."
- Have a casual conversation, instead of coaching through questions.
- Minimize any aggressive or confrontational word choices:
  - "How can I help?" can imply that you're able to help them in a way they can't help themselves. This signals that you have more power/skills/expertise, which can lead to a negative reaction.
  - "I'm proud of you" has a parental connotation, potentially making the person you're speaking with feel lesser or lower than you. Instead try "I'm impressed by you."

You have the ability to create an operating environment in which your team members can be honest and constructive with one another. Give them the tools to have candid conversations about opportunities to improve their performance.

## ▶ How to Structure a Confrontational Conversation

- 1** Ask if the circumstances on which you're delivering feedback are **unusual or came about due to factors outside of the person's control**. Their answer could change your recommendation.
  - A. If circumstances were unusual but their intent was correct, give them a pass.
  - B. If circumstances were not unusual and they deliberately behaved in a way that you know is likely to be repeated if not corrected, proceed to Step 2.
  
- 2** Ask them to verify what process is expected for this situation.
  - A. Are they aware of what good looks like? If not, teach them. This is simply a knowledge gap – no need to escalate to confrontation.
  - B. If they know what was expected but intentionally chose to behave a different way, this is likely a skill gap. Proceed to Step 3:
  
- 3** **Explain your perspective.** “This is how I interpret the situation... Can you see it from my perspective?” At this stage, they will realize you're holding them accountable to behave in a certain way and that your expectations were not met.
  
- 4** **Offer the options you see.** Give them the power to take the right steps to fix or alter their behavior. Do not attack them or their character, and do not force them to do this exactly the way you want them to. For example:
  - Option 1:** What correction can they make to implement the right process?
  - Option 2:** Create a performance improvement plan together to clearly define expectations.
  - Option 3:** What will happen the next time this situation arises if no change is made?

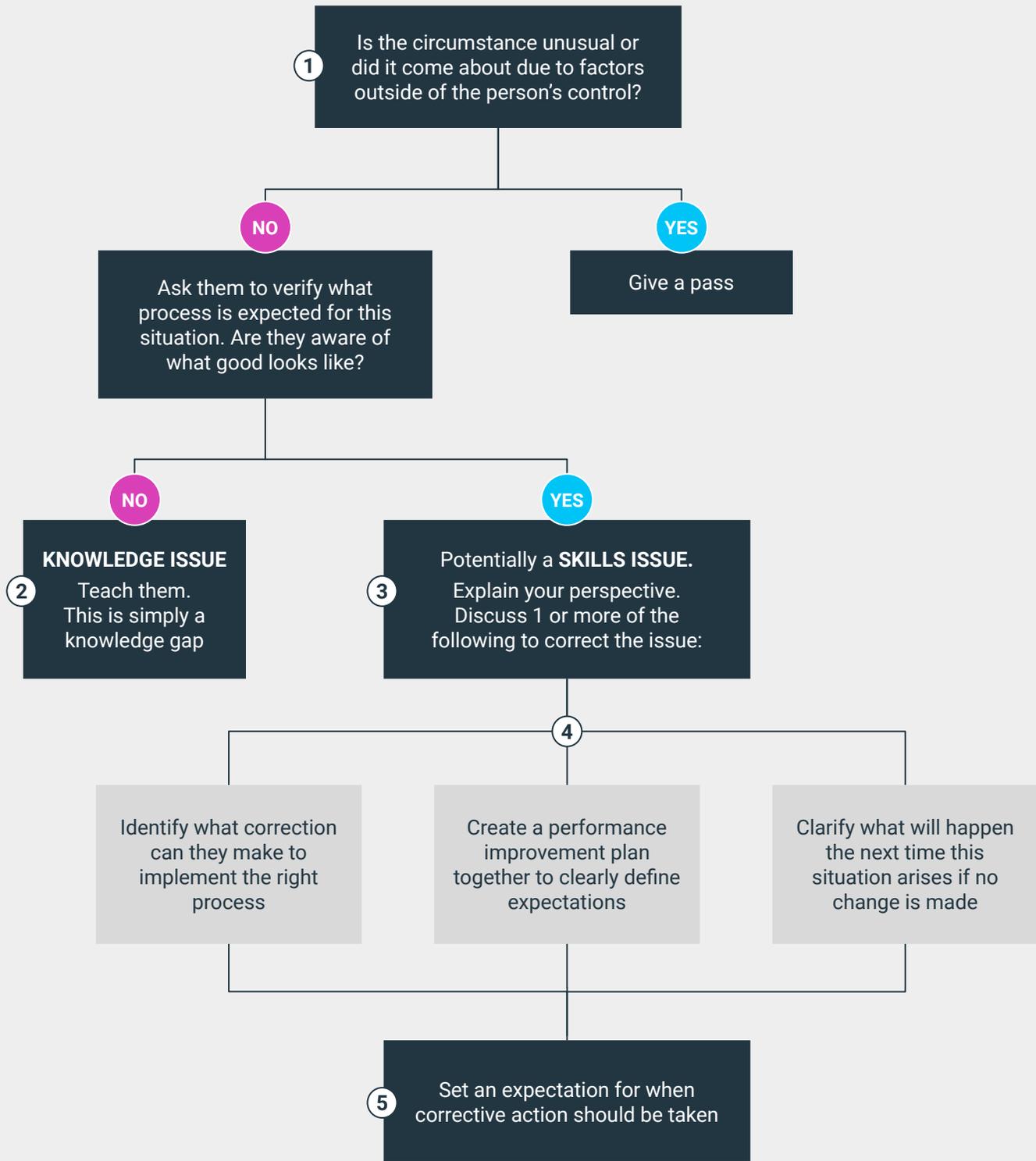


Figure 1. Structure of a confrontational conversation

## 5 Create accountability:

- A. Set a date by which you expect them to take corrective action. Be clear on how you will hold them accountable to their word. This may be immediate, or it may be ad hoc if the situation happens in an unpredictable time frame.
- B. Be fair but not threatening.

Individuals are rarely able to see the opportunities to improve their own performance, which makes the role of the coach so important. When possible, have video recordings of their behavior to review together as you coach. This is the most powerful way to avoid the Dunning-Kruger Effect (when people with low ability to do a task overestimate their own ability).

As an independent observer and coach who knows the goals your team is trying to achieve and how they're trying to get there, you are in the best position to identify the behavior changes required to achieve high performance.

### Candid Conversations Are...

#### Focused on achieving the rep's "WHY."

If your intention is truly to help your reps achieve their personal and professional goals, then all feedback is constructive and should not be difficult.

#### Not an opportunity to attack.

By using the blueprints as an agreed-upon way to perform, you enable reps and their peers to provide objective feedback without applying personal judgment, whether that be in 1:1, 1:few, or 1:many coaching scenarios.

#### Not urgent, but important.

Candid conversations are often overlooked because more urgent issues come up – or because confrontation may have negative consequences. Have them anyway.

## ► Help Your Team Receive Feedback

**A strong professional relationship is based on consistency and accountability.**

To help your team receive constructive feedback, you need to build a strong professional relationship based on consistency and accountability:

- **Consistency** starts by making regular meetings with your team a priority – don't reschedule your 1:1s and team meetings. You need to ensure consistent intent and stay continually focused on the collective as well as each individual rep's 'why'.
- **Accountability** isn't just about ensuring your team is hitting their REKS goals. It begins with leading by example and completing any actions from your 1:1s and team meetings in a timely manner. Be the champion of the group's agreed-upon coaching principles.

When consistency and accountability are implemented hand-in-hand, they build trust within your team and create an environment of positive reinforcement.

## ► Tools For Providing Feedback

Giving feedback doesn't come easy for many people, but it's the most important conversational tool for creating the change required to achieve your performance goals. Here are a few ways to make sure your feedback is impactful:

### **Tool 1** Align your feedback with their motivations.

When providing candid feedback, it's important to ensure you have the right motives for providing the feedback.

1. Is your aim to improve the situation and enable them to succeed?
2. Is the behavior you're asking them to reflect on improving or impeding their goals?

**Tool 2 Ensure the feedback is targeted.**

Constructive feedback should be:

- **Objective** – Based on the application of a skill to the agreed-upon framework or based on the results/effort applied to the agreed-upon goals
- **Actionable** – Limit the amount of feedback you provide so that it's actionable
- **Timely** – Don't let time distort everyone's memory; provide feedback at the first available moment
- **Specific** – Don't be vague; use specific customer calls, emails, and employee engagements

**Tool 3 Consider delivering your feedback through questions.**

By asking questions instead of leading with statements, you stimulate critical thinking and provide context to the candid conversation. For example:

Observation	Question
Someone is pitching instead of diagnosing.	<i>What is the impact of solving the customer's pain points? How did the customer respond when you said...</i>
The rep is doing all of the talking during a customer meeting.	<i>What do you think the customer was thinking at this point of the conversation? What other ways could you deliver that message?</i>

**Tool 4 Help them take action.**

This is particularly pertinent for manager-led coaching conversations.

Ask the person receiving the feedback:

- What are you willing to commit to doing?
- What support do you need from me and the team?

When building a high-performance coaching culture, you and your team must continually strive to improve your performance and ultimately your results, so candid conversations are inevitable. This framework and these tools will give you the confidence to have the candid conversations required to build a strong coaching culture.

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# Run Team Meetings for Skill Development

## Boring openers to avoid

*“Thank you for coming today. It’s an honor to speak with you.”*

Bleh! This common opening line is not the way to capture attention. It sounds canned, cliché, and misses the best opportunity to grab your audience's attention.

*“The method we were taught in school is based on a lie.”*

This opener offers intrigue. Your audience may not be sure if they agree yet, but it evokes curiosity.

Like the opening to a keynote speech, the opening of your team meeting is a critical opportunity to engage your audience! The most seasoned speakers are focused on captivating listeners with a message that resonates.

In order for you to prepare for your next large team meeting, here are some steps that will help you get started. This blueprint will teach you how to execute two types of team meetings, those focused on skill development for a big group and weekly meetings that combine performance and development reviews.

## MEETING 1

### Skill Development & The Key Learning Objective

Every session you lead should have a clear purpose (or what we call a learning objective). The learning objective is the reason you're speaking. To clarify how you'll explore this topic, break it down into three sections. Explain what the audience will 1) know, 2) be able to do, and 3) think about by the end of the session.

For example, here's the learning objective if you were teaching question-based selling using the SPI framework:

At the end of this session, you will **KNOW** how to categorize diagnostic questions into S, P, and I with context vs. no context

You will **BE ABLE TO** ask closed-ended questions with context before asking open-ended questions

You will **THINK ABOUT** how to prepare effective questions based on desired answers

Creating learning objectives will help you refine the message for the group you're speaking with. Be specific: it's common for experts to be able to take their insights in many different directions. Focus on the key learning objective to avoid distraction from what you're trying to cover.

#### ▶ Focus question

Prepare a question for your audience to ask themselves (that your session will answer). For example, "How do we encourage customers to trust us and open up when we ask questions?"

#### ▶ Create a plan

It's surprisingly hard to keep track of time when you're speaking in front of a group. Professionals start and end on time, delivering the desired outcome within the agreed upon constraints.

But no one likes listening to a robot. We have trouble connecting with speakers who come across as too rehearsed. On the flip side, someone who wings it or struggles with organizing their thoughts can also detract from the power of their message.

The solution? Create a plan that outlines your opening lines, transitions, and any exercises or activities that are relevant to reinforce your session.

Below is a sample plan for a one-hour session on SPI questions:

Time (hh:mm)	Speaker Notes / Whiteboard Image	Transitions and Questions to Ask
0:00-0:08	<b>Agenda:</b> Review previous material; example of ACE and Agenda	Did the customer open up to you by adding an item to the agenda?
0:08-0:20	<b>Topic 1:</b> Close-ended Situational questions <ul style="list-style-type: none"> <li>Context vs. no context (<i>How many employees? vs. I noticed you have 100 employees; is that right?</i>) Use this to build trust, show you care</li> <li>Situational = answer with yes/no or fact</li> </ul>	Don't tell someone to "trust you" or say "I'm an expert." Prove it by demonstrating research. Don't just say, "I did a bunch of research on you, but may I ask, what do you do?"
0:20-0:30	<b>Topic 2:</b> Pain (open-ended) <ul style="list-style-type: none"> <li>Typically start with "How..." or "What..."</li> <li>Not just negative (<i>What challenges are you unhappy with...?</i>)</li> <li>Answers to pain questions usually point inward: <i>takes too much time, it's frustrating, no visibility, etc.</i></li> </ul>	Asking closed- before open-ended questions helps build context; the customer knows how to respond.
0:30-0:40	<b>Topic 3:</b> Impact <ul style="list-style-type: none"> <li>Your goal is to get them to point to increased revenue, reduced cost (rational), better customer/user experience (emotional)</li> <li>Don't ask too early in the convo; it sounds salesy</li> <li>Answers to impact questions connect two parts of the business (<i>if we fix this for Sales, then the Product team can...</i>) or align to executive priorities</li> </ul>	Openers: <i>Has that led to..., how does that affect..., the last time this happened, did that cause...?</i>
0:40-0:50	<b>Workshop:</b> Practice putting it all together: <ul style="list-style-type: none"> <li>ACE only</li> <li>Agenda only</li> <li>ACE + Agenda</li> <li>Wagons only</li> <li>ACE + Agenda + Wagons</li> </ul>	Have one student demonstrate with you. Then orchestrate roleplay between students. Finally, do breakouts, having everyone partner up.
0:50 - 1:00	<b>Wrap Up:</b> What did you learn that you didn't know before?	What will you apply this week?

## MEETING 2

# Weekly Team Meetings

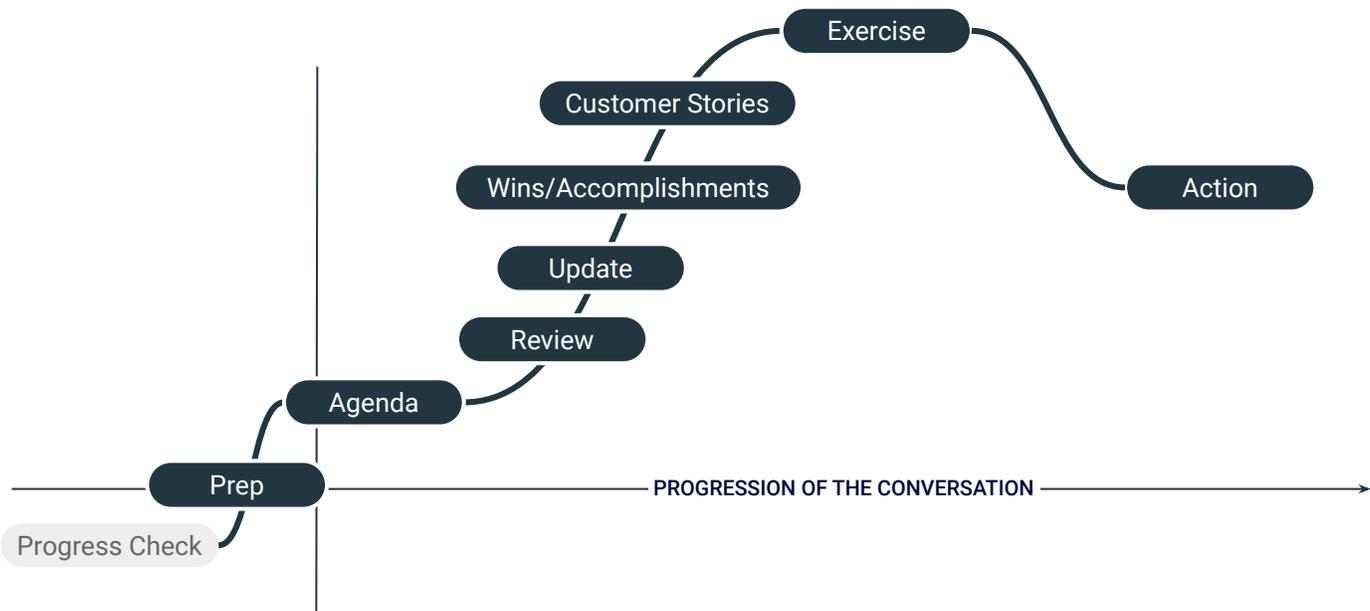


Figure 1. The key topics in an effective weekly team meeting.

In a collaborative coaching culture, you must continuously connect your team to their “why.” Point them towards a common goal and provide them with an opportunity to learn from each other’s wins and losses. A well-run weekly meeting is the perfect opportunity to do all of this while motivating your reps for the week ahead.

As your team grows and scales, repurpose your meetings to ensure you’re still delivering value. If a meeting is perceived as something that could’ve been handled over an email, you’ll lose engagement.

Delegate responsibility for different parts of the meeting – this will allow for leadership development and create a more interesting meeting, since it allows many voices to be heard.



Below is an example of a weekly meeting outline with allocated times that could form part of your agenda:

Step	Description	Prepare	Duration
<b>Review</b>	Collate and review data for the agreed-upon previous time period and compare performance over time.	Obtain the required data from the relevant data sources	5 mins
<b>Update</b>	Provide an update on how the team is performing against their REKS objectives for the business period. Leverage your leaderboards for “results” and “effort” to create a competitive spirit. When done correctly, this can be a great motivator for the team and help build a stronger culture.	Conduct gap analysis to identify areas of focus	5 mins
<b>Wins</b>	Ask reps to share their wins and accomplishments. This doesn't need to be a won deal; it could be securing a large meeting, negotiating terms, etc.  Come prepared with wins and accomplishments from the past week to prompt reps to share specific events	Review your reps' weeks to help them share positive events	10 mins
<b>Customer Stories</b>	Sharing customer stories is key to learning. Identify two reps to share a positive or negative customer engagement leveraging the SPICED framework.	Identify relevant customer stories among the team	10 mins
<b>Reflection Exercise</b>	Go around the team and ask them to identify the effort, knowledge, or skills they are going to: <ul style="list-style-type: none"> <li>● STOP doing, because it wasn't working</li> <li>● START doing, to identify and test another activity/skill to achieve their goal</li> <li>● KEEP doing, because of previous success</li> </ul> See more exercises in the Annex below	Review notes from the previous meeting	10 mins
<b>Action</b>	Ensure everyone is clear on what tasks they are committing to in the coming week to move them closer to their REKS goals.	Create a shared place to keep actions from these meetings to review	5 mins

Ensure meetings are scheduled with enough advance warning that your team plans other meetings around them. When team meetings happen consistently and provide value, your team will prioritize them.

Align the velocity of these meetings with the selling velocity of your sales team. For instance, BDRs and AEs in a high-velocity environment should meet weekly. Field sales reps in an enterprise sale could achieve success with meetings every two weeks instead.

When meetings are held regularly and focused on helping reps succeed (rather than beating them with a stick to improve or solely to collect information from them), they can band the team together towards a common goal and build trust between individual reps as well as collectively across the team.

## Annex: Activities to reinforce and engage

### ▶ Roleplay - RingRing

Throughout your lesson, perform mini-breakout RingRing sessions. Have each rep turn to their partner or have everyone stand up and find an area to huddle in groups of two to four, and practice a key lesson.

Remind everyone how to set up a RingRing:

- Skill: Start with “why”
- Scene: When would you use this skill in real life?
- Set-up: Who will be playing the salesperson? Customer? Coach?
- Start: Do you have any questions?
- Feedback: Evaluate process, then execution

## ► Polls / Pop Quiz / Kahoot

Create a surprise moment where there's a little competition.

Kahoot is an online app that everyone can download on their smartphone. It allows for real-time polls with scores dependent on time and correct answers — it becomes the leaderboard for all individuals in the room.

If performing polls or pop quizzes without technology, follow these steps:

- Choose one student to answer the first poll question; discuss the answer
- Ask that student to choose the next student
- The next student reads the second poll question and answers; discuss the answer
- Continue until all questions are complete

## ► Breakout Rooms

- These are best done in groups of three so that everyone has a chance to practice and watch others engage. When there are just two people per group, sometimes one person is away from the screen (taking a break, going to the bathroom, etc.) so the other person is stuck solo.
- If on-site, use different parts of the room or even the hallways. It's really valuable to get people up and moving!

## ► Index Cards

- Hand out four index cards at the start of your team meeting.
- Periodically ask students to write a number on one side and an answer or reflection on the back.
- Example: "On the back of your card, write the #2. On the front, write a Pain question. When done, pass your card to the person on your right. Now read their card. If you agree it's a pain question, write an answer that a customer would give for that question. If you disagree, rewrite the question to make it an open-ended Pain question."

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