

Training versus coaching

DUNCAN STEEL describes his recent research findings that strengthen the case for integrating sales training and sales coaching

My recent research profiles the key characteristics of an effective induction programme for new sales recruits in financial services. Based on in-depth interviews with senior business development executives from two higher and two lower-performing financial services companies in the UK, the study identifies a number of practical steps for planning and executing a successful induction programme.

The findings have implications for salespeople in many industry sectors. They indicate that, above all, the higher performers are differentiated from the lower by the extent to which they have integrated and properly aligned their sales training and sales coaching activities.

The study observed that:

- Formal, classroom-based sales training programmes lasting 5-10 days and including a cohort of 8-15 people are the norm
- Some firms use a specialist internal trainer as-required. Others use a blend of high-performing salespeople from the company, together with experts from outside the company who specialise in financial services sales training and who can challenge existing practices
- One of the most important elements of an effective sales training programme is the need to design content in a logical, progressive, step-by-step sequence
- There is general agreement about the key topic areas to cover, including: product knowledge, industry knowledge, customer and market knowledge; the sales process (incorporating a range of selling skills, tools and techniques such as interviewing, presenting/benefit selling, closing and objection-handling); new business prospecting methods; customer service and relationship building procedures; and self-management
- There is confusion about the term 'coaching', with many firms still believing that it means the office/branch sales manager 'showing a salesperson the ropes' by taking them out on customer visits
- But some are now showing a detailed understanding of the sales coaching process, often planned to follow up and build upon the initial sales training programme.

KEY SUCCESS FACTORS

Much of the conventional wisdom about effective sales training includes the importance of setting clear objectives, especially those that relate to knowledge-acquisition, and focusing on covering each of the key job tasks to be performed by the company's salespeople.

But the research suggests that a number of other key success factors appear to be uniquely associated with the training activities of the high performers. For example, it may well be preferable to use high-performing salespeople who have credibility in the eyes of delegates

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KEY FEATURES OF SALES TRAINING VERSUS SALES COACHING

Sales training programme	Sales coaching programme
Infrequent/occasional	Frequent/on-going
Generalised to sales team	Individualised one-on-one
Knowledge acquisition focus	Skill acquisition focus
Classroom-based learning	Experiential learning
Fixed/planned agenda	Dynamic/adaptive agenda
Instructor-led	Salesperson-led
Mandatory	Voluntary
Shorter-term goals	Longer-term goals

due to their track record of sales achievement, together with an external financial services sales consultant.

In particular, it has highlighted the very different role that a sales coaching programme plays, as compared to a sales training programme. The table above summarises some of the key differences.

In relation to coaching, the basic success factors are:

- The setting of clear objectives, especially those that relate to the cultivation of selling skills and self-appraisal
- The need for a coach to be constantly questioning, encouraging and challenging the salespeople to develop their own evolving learning goals and sales targets and to provide them with ongoing feedback
- The requirement for the salesperson to be a self-starter and take full responsibility and accountability for their learning over time.

The research shows that perhaps the most important and distinctive attribute, however, is the extent to which companies have sought to integrate and align their sales coaching activities with their sales training activities.

As the diagram below indicates, a new salesperson requires an almost exclusive focus on basic knowledge acquisition in order to provide a strong platform for their future development. But as they gain experience, training becomes less effective, and sales coaching assumes an increasingly important role in taking the salesperson to the next level.

The research suggests that salespeople should aim to pursue an appropriate balance of both sales training and coaching throughout their careers - ideally, all the way to a point at which they are capable of ongoing independent learning, having reached the highest levels of Bloom's taxonomy (ie. having achieved the skills of application, analysis, synthesis and evaluation).

AN INTEGRATED SALES TRAINING/COACHING MODEL

