Engage, Motivate, Succeed:

Tailored Coaching to Bridge the Sales Performance Gap

The decisive factor between a thriving sales team and a struggling one is often a manager's ability to deliver effective coaching that empowers each rep to meet their performance potential.

Sales coaching can make or break a successful team, and leaders who deploy a 'one size fits all' approach will likely see their teams struggle. Ineffective coaching hinders your organization's revenue growth, but the problem runs even deeper. It leads to unmotivated and disengaged sales reps, high turnover, and low team morale.

According to **QuotaPath**, **91%** of sales teams failed to achieve 80% or more of their quota targets in 2023. Over the long term, only **47%** of sales reps at B2B organizations hit their quota targets (**Forrester**). Sales organizations have to deal with unique turnover challenges too: employee turnover rates are **3x higher** (35%) for sales teams compared to other teams within an organization (**HubSpot**). Sales managers are struggling to keep all their reps engaged, motivated, and performing at a high level. This creates significant performance gaps where reps fall well short of their potential, making it exceedingly difficult for teams to reach revenue goals.

Performance gaps close when all reps within a team are fired up and executing maximally effective behaviors. This is much easier said than done - each rep has a different personality, a different selling style, unique motivation factors, and different performance levels. Each rep requires a different coaching approach to reach their full potential, but individually tailored coaching can be impossibly time-consuming, especially for larger teams.

With the right coaching strategies, sales managers can enable each rep to focus on fundamental behaviors that increase performance while maintaining high morale across their teams. But without the right tools, sales leaders struggle to identify issues and effectively rally their reps. Fortunately, solutions exist.

Telltale Signs of Ineffective Coaching: Inconsistent, Generic, & Surface Level

The magical excitement of an energized and enthusiastic sales team is unmatched. Reps are motivated to chase ambitious goals, team members seamlessly collaborate, and the entire sales organization thrives on the challenge of generating revenue. Success creates more enthusiasm which creates even more success - a positive feedback cycle where the whole team accels.

The opposite scenario resembles a nightmare. Frustration and negative attitudes quickly become contagious and spread throughout the sales organization. High performers rely on their skills to generate individual success, but their self-motivation burns out and they leave for another opportunity elsewhere. Their wins do not radiate enthusiasm to the rest of the team. Low performers and middle performers are left lost on how to take the next steps to reach higher levels of performance. They will also leave in search of more fulfilling opportunities. The sales organization might be lucky enough to scrape its way to revenue goals, but morale is low, reps are disengaged, turnover is high, and a ton of opportunities are left on the table.

So what's gone wrong in this dark scenario? **Ineffective sales coaching is often the principal cause of low morale and significant performance gaps on an individual and team level.**

Coaching failures can manifest in many ways, but the most common issue is that team leaders deploy a **'one size fits all' generic approach**. Each sales rep has different motivational

> Ineffective sales coaching is often the principal cause of low morale and significant performance gaps on an individual and team level.

3

factors, different strengths, and different experiences that have shaped their current skill sets. Deploying the same coaching strategy across a diverse sales team is like trying to fit a square peg into a round hole. Generic strategies are doled out in team meetings, leaving reps helpless on how to overcome individual challenges. Team-level coaching might be helpful for a few reps, but it will be completely irrelevant for others. These team meetings can be a good way to build camaraderie and keep everyone aligned with overall revenue goals, but they need to be accompanied by individual-level guidance if reps are to overcome the specific challenges they are facing.

According to the most recent **Salesforce State of Sales** report, **only 26% of sales reps receive one-on-one weekly coaching**. In this environment of scarce individualized coaching, high performers stagnate because managers feel they can succeed on their own, middle performers fail to fulfill their potential because managers feel they are doing enough to stay afloat, and low performers become discouraged because they can't hit performance goals.

A 'one size fits all' approach also creates difficulties when setting appropriate KPI goals for reps. **Unreachable goals will lead to discouraged reps, whereas overly conservative goals leave revenue opportunities on the table.** Team leaders often set KPI goals for their reps that are intended to guarantee the team reaches overall revenue goals - a top-down approach. However, this approach does not take full advantage of the potential of each rep. Some reps can probably shoot higher, whereas others might need more reachable goals at first to stay motivated. The latter scenario is especially critical during the onboarding process of new reps. A successful onboarding process needs to incorporate KPIs that meet new reps at their current experience level. Overzealous KPIs during these initial onboarding stages hinder the momentum of a new rep before they can get off the ground.

To complicate matters further, the optimal KPI is not static. "We've all had that rep that crushed it a quarter, maybe two quarters ago, and then now is really struggling," observes Jason Moore, Chief Sales Officer at **ChurnZero**. A generic coaching approach remains stubbornly unchanged in the face of dynamic situations.

In addition to genericness, coaching tends to be inconsistent due to bandwidth constraints. Managers can only afford the time to help reps during key moments of the sales cycle. They help low performers with prospecting, they help when a deal is on the verge of closing, or maybe they help a struggling rep refine their cold calling approach. **The bottom line is that one-on-one coaching is often inconsistent, coming at times only when it is most needed.** Managers miss opportunities to reinforce effective behaviors that will help reps flourish and build upon wins. Rather, they only have time to make knee-jerk reactions to specific situations.

So why don't managers simply schedule weekly one-on-one meetings with all their reps and deliver the right strategies to help them overcome their specific obstacles? It's much easier said than done. Managers feel like they don't have the bandwidth to thoroughly dive into the journey of each rep on their team. In other words, managers lack an efficient way to uncover insights into their reps' performance.

Inefficiency in uncovering performance insights stems from managers not knowing where to look or being unable to quickly analyze activity data. Gleaning insights from the data behind the performance of each rep is overly time-consuming and impractical. The result is **surface-level coaching**. Managers fall back on coaching strategies that have worked in the past, but these previously effective strategies might not work anymore in a new situation. There is valuable information in the data behind each rep's performance - where are they losing opportunities? How effective are their calls with prospects? Without external help, managers can't possibly analyze this data for each rep.

> "We've all had that rep that crushed it a quarter, maybe two quarters ago, and then now is really struggling."
>
> **Jason Moore**
> Chief Sales Officer at ChurnZero

Without data-driven insights, team leaders are forced to guess the best way for each rep to move forward, and they have to make this guess quickly because they have a whole team to manage. Managers can't dedicate their entire day to figuring out one obstacle for one rep. Any individual-level guidance needs to be concocted quickly so that the manager can move on to the next problem, and rushed guidance represents a missed opportunity to use data to find a more effective way forward.

Falling behind: A constant scramble

A career in sales is often associated with chaos. Job listings for SDRs or AEs often say something like "handles pressure/stress well, comfortable with ambiguity, ready to tackle unexpected challenges." Successful sales reps make quick reactions to stay on track toward KPIs, and they sense when they are veering off course and need to change their approach. But what about the rest of the team? Many reps only become aware they are off-track from their KPIs when it's too late to make appropriate adjustments. They rely on their managers to help sound the alarm when they are drifting from their objectives.

But team leaders feel it's impossible to keep a close eye on the KPIs of each rep. Maybe they can conduct a progress check at the end of each week, or maybe even the end of each day, but **they lack the visibility to track KPIs in real-time**. In other words, managers can't course-correct at the right moments. Many managers place a singular focus on team-level KPIs, but these indicators do not give a complete picture of performance. A hyperfocus on team-level KPIs will leave many reps in the dark, with their struggles unrecognized and a growing feeling they aren't supported.

The culmination of ineffective coaching is **low team morale, which leads to low employee retention**. If a rep doesn't feel supported by their team leaders, they are much more likely to

depart their current organization. This is true for every rep regardless of performance level. Sales teams are perhaps the most difficult department of an organization to keep content and in-tact. Competing organizations are always hiring and skills are extremely transferable, and the high-stakes world of quota attainment creates ample opportunity for overwhelming frustration and disappointment.

Sales teams can stay afloat by quickly filling the spots of departing reps, but onboarding costs add up. Turnover represents a significant missed opportunity to create a team of skillful reps who are experienced in overcoming the specific obstacles of a particular organization. Again, teams are forced to play catch-up.

Most organizations believe the above scenario is unavoidable. There just isn't enough time in the day to give each rep the coaching they need to be maximally successful. Managers are forced to trade specificity for efficiency - they have no choice.

But what if that wasn't the case? What would it look like to run a sales organization where the troubles of ineffective coaching no longer exist?

A hyperfocus on team-level KPIs will leave many reps in the dark, with their struggles unrecognized and a growing feeling they aren't supported.
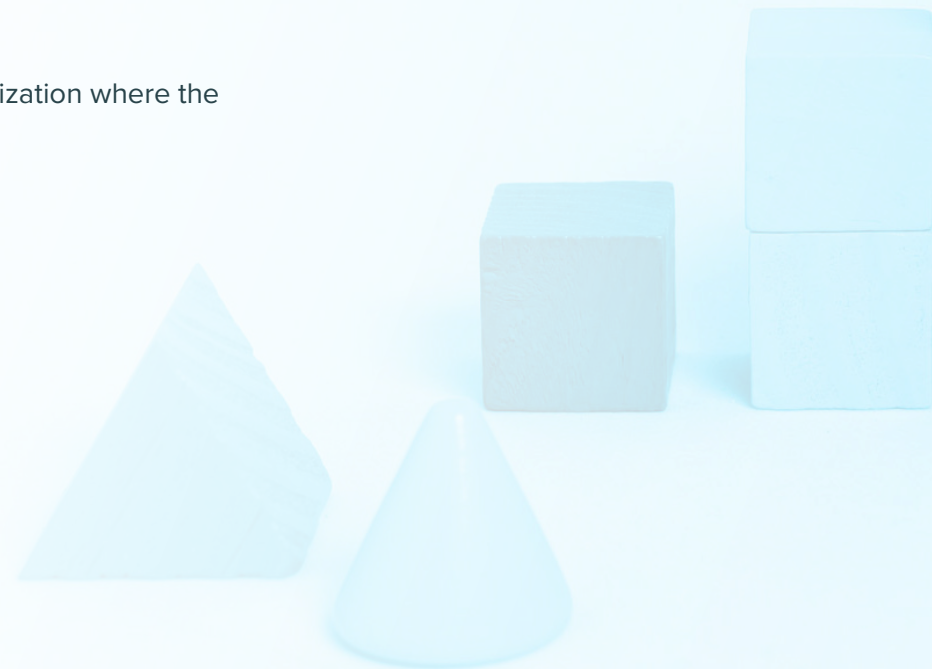
Personalized and data-driven: Painting a picture of effective coaching that leads to high morale and performance

The scenario described in the previous section paints a picture of a dim but common sales environment filled with frustration and performance stagnation. What about the other end of the spectrum? What does it look like when managers maximize the effectiveness of their coaching?

A sales team only achieves its full potential when each rep is firing on all cylinders. High performers continue to strive for new heights, middle performers are inspired and motivated to climb to the high-performance echelon, and low performers recognize a clear path forward to improvement. This ideal scenario is achieved only when sales coaching is tailored to the specific strengths and weaknesses of each rep, and KPI goals are set accordingly.

*"Ultimately, the goal is the same - continuous improvement. But the path and pace differ based on where they are in their journey. It's about meeting each individual where they are and helping them reach their next level of excellence." (Anup Khera, VP & General Manager - International, **Attentive**)*

A prerequisite of effective sales coaching is **appropriate goal setting**. A sales team that is reaching its full potential is made up of reps with personal KPIs that are optimally ambitious. Each rep is striving for goals that are aggressive but reachable. For this to be the case,

KPI goal-setting needs to be backed by data and take into account the individual skills and experience of each rep. "Individuals at all levels, at all stages of their career, are wired to want to be improving. We want to feel like we are accelerating, or growing, or learning," says Catie Ivey, CRO at **Walnut**.

Once optimal KPIs are set, effective coaching helps reps identify and reinforce the behaviors and strategies that lead to successful outcomes. To most efficiently accomplish this, **effective coaching requires real-time KPI tracking**. Reps need visibility into their progress toward KPIs and they need data that illuminates how their behaviors are helping or hindering their performance. Managers also need visibility into each rep's KPI progress so they can quickly identify reps that are falling off track and help them realign before the problem gets overwhelming. In a well-run sales organization, managers can swiftly make connections between KPIs and conversion rates at each stage of the sales process, and reps have a clear understanding of how their KPIs help drive revenue.

The first step of effective coaching is the ability to identify opportunities for improvement on a case-by-case basis. In other words, a team leader's job is to efficiently identify performance gaps that can be closed for each rep on their team. The next step is to ensure that reps are coached towards the most direct route to close these gaps.

Team leaders need the ability to quantify the effectiveness of their coaching.

Just like how reps need data to identify effective behaviors, managers also need data to identify successful coaching strategies. An effective sales coach has **clear insights into the efficiency of their coaching strategies**, allowing them to make adjustments and keep their

> "Ultimately, the goal is the same - continuous improvement. But the path and pace differ based on where they are in their journey. It's about meeting each individual where they are and helping them reach their next level of excellence."

Anup Khera
VP & General Manager - International, Attentive

team focused on behaviors that drive revenue. Without data, managers are just taking shots in the dark. With data, they can ensure that the coaching strategies they are deploying are actually accomplishing their intended purpose.

In this optimal scenario, managers have a clear understanding of their team-level KPIs and how each rep is contributing. They can understand the pressure points that their team is facing. Where is their team struggling? Do they need help prospecting, closing, handling objections, or something else? By identifying these pressure points, managers can implement behaviors to help relieve them. With data, managers can then measure the impact of these new behaviors.

When managers have complete visibility into team-level KPIs, they can effectively communicate to their reps how individual-level KPIs roll up effectively to help the team reach its goals. The result is motivated reps who are enthusiastic to maximize their personal performance while ensuring their teammates reach their full potential as well.

Effective coaching creates motivated reps with a sense of empowered autonomy. Reps are confident they are being given the right guidance to reach ambitious goals. Initiatives are met with teamwide enthusiasm and reps are excited to participate in team-building activities that enhance performance and camaraderie. Reps feel that their company is investing in their future. Anup Khera, VP & General Manager at **Attentive**, recognizes that effective coaching is one of the best ways to retain reps over the long term: "When we invest time in coaching, we're showing our team that we're committed to their growth. This fosters a sense of value and belonging, which directly impacts retention. **People stay where they feel they're developing and have a future.**"

Onboarding costs go down, reps close performance gaps, and the team reaches its full potential. But what about time constraints? How can managers work with each rep on a granular level without sacrificing efficiency? With the right tools, it's possible to overcome these barriers.

Constructing the bridge that closes sales performance gaps

Efficient implementation of effective coaching strategies with the right tools

With the right tools, sales organizations can escape the turbulence created by a generic approach and move towards the optimal model of personalized, data-driven coaching.

So where can these tools be found? **Ascent Cloud** is making it easier than ever to guide reps to success and close performance gaps.

Ascent Cloud's **LevelEleven** product equips managers with actionable insights from readily available sales data on the performance of each rep and the team as a whole. Performance scorecards provide real-time visualization of each rep's performance, allowing coaching to be timely and tailored to the KPIs that each rep is looking to achieve. Both managers and reps can digest large amounts of data through color coding to track progress toward particular metrics. Reps can self-monitor their performance rather than rely on their own analysis or their

The LevelEleven Performance Index (LPI) quantifies and ranks the performance of each rep so that reps that need more guidance can be quickly identified. This precious information creates a golden opportunity for highly effective individually tailored coaching for reps.

manager's help. This represents a massive time-saving opportunity for sales organizations because managers and reps don't have to spend tedious hours analyzing activity goals to pinpoint weaknesses. It's done in real-time for each rep, instantly.

"Coaching without metrics isn't really coaching." (Jason Moore, Chief Sales Officer, ChurnZero)

Manager scorecards accomplish similar objectives at a higher level - rather than scoring the performance of reps, manager scorecards give a view of team performance as a whole, while also providing visibility into how each rep is contributing to overall performance. The LevelEleven Performance Index (LPI) quantifies and ranks the performance of each rep so that reps that need more guidance can be quickly identified. This precious information creates a golden opportunity for highly effective individually tailored coaching for reps. Managers can eliminate the time they were spending identifying which particular reps need help and move straight to identifying specific problems that each rep is struggling with. The insights are served on a silver platter - it couldn't be easier for team leaders.

Once a manager implements a coaching technique with struggling reps, they can easily monitor how those reps' LPI changes. If reps start to perform better, the coaching strategy is working. If the reps' LPI stays the same or gets worse, the manager needs to try something else. Managers aren't left wondering if their coaching techniques are helpful. They can take a data-driven approach to evaluating their coaching effectiveness.

Optimized goal setting that maximizes performance and morale

LevelEleven enables managers to take the guesswork out of goal setting and set KPIs that perfectly balance ambition and attainability. The key is using historical data and adjusting to the current sales environment. LevelEleven's Goal Engine quickly analyzes historical averages to create a suggested goal for your current team - the heavy lifting of historical data analysis is completed in an instant. Then, Goal Engine helps quantify the realisticness of both individual and team goals, which helps assure reps they are chasing realistic benchmarks. The result is highly engaged reps who are confident in their ability to reach targets.

Goal Engine helps keep managers in tune with their team's progress towards goals. If the team is falling off track, managers can reassess their game plan or readjust their goals. There is ample opportunity to avoid the team-wide frustration that comes with repeated missed goals. Instead, morale stays high because reps are excited to hit targets both on the individual and team levels.

Enhanced visibility into KPIs to expedite course-correction

Specific guidance is a critical element of an individualized coaching approach. And without data, specific guidance is very hard to give. Real-time KPI tracking is vital if managers want to identify how and when their reps are falling off track, and it's also necessary for managers to be able to effectively communicate to reps where they are going wrong. Catie Ivey, CRO at **Walnut**, knows that specificity is of utmost importance: "To me, I think the most important thing is to come up with something very specific. So if it is data or metrics that we're looking

> "…if it is data or metrics that we're looking to anchor around, then I would want a very concrete data point. Then, you can give very tangible, actionable advice in terms of ways to improve."
>
> **Catie Ivey**
> CRO, Walnut

to anchor around, then I would want a very concrete data point. Then, you can give very tangible, actionable advice in terms of ways to improve."

Tangible, actionable, specific - all elements essential to effective sales coaching. Performance Scorecards, LPIs, and the Goal Engine are all solutions that make it easy for managers to efficiently obtain the data and insights they need to accomplish these integral ingredients.

Create consistency: Meet with the right reps at the right moment.

With LevelEleven's coaching cadences, managers can ensure they provide consistent coaching to each rep. Personalization can be taken one step further with customizable coaching templates which allow managers to create individual approaches for each rep. Individual coaching at scale is now possible.

The data is at the manager's fingertips, but they still need to deliver insights to reps at the right moments. With coaching cadences, managers can make sure that each rep is receiving individual attention. It's the very basis of an individualized approach - each rep needs to be dedicated time to receive coaching.

## Recognize success and maximize motivation through gamification.

69% of employees report that they would be willing to work harder if they received recognition in the workplace, employees are ten times more likely to strongly agree that they belong within an organization where their contributions are recognized, and 80% of employees report that they are more productive when given recognition and rewards (**Business Leadership Today**).

But a simple "good job" or congratulations during a team meeting is not enough. In addition to financial incentives, badges milestones and competitions are great ways to keep reps engaged and motivated. LevelEleven makes this easy. All the sales leaders we interviewed for this ebook agree that recognition is crucial to keep reps motivated. Jason Moore, Chief Sales Officer at **ChurnZero**, believes that being in tune with reps' motivational factors is an essential part of being a manager: "If your manager doesn't know what motivates their employees, that's where I start to get scared in terms of questioning if this manager is really plugged into their team, or just an Excel manager, a Salesforce manager, a meeting manager just going through the motions."

80% of employees report that they are more productive when given recognition and rewards.

Business Leadership Today
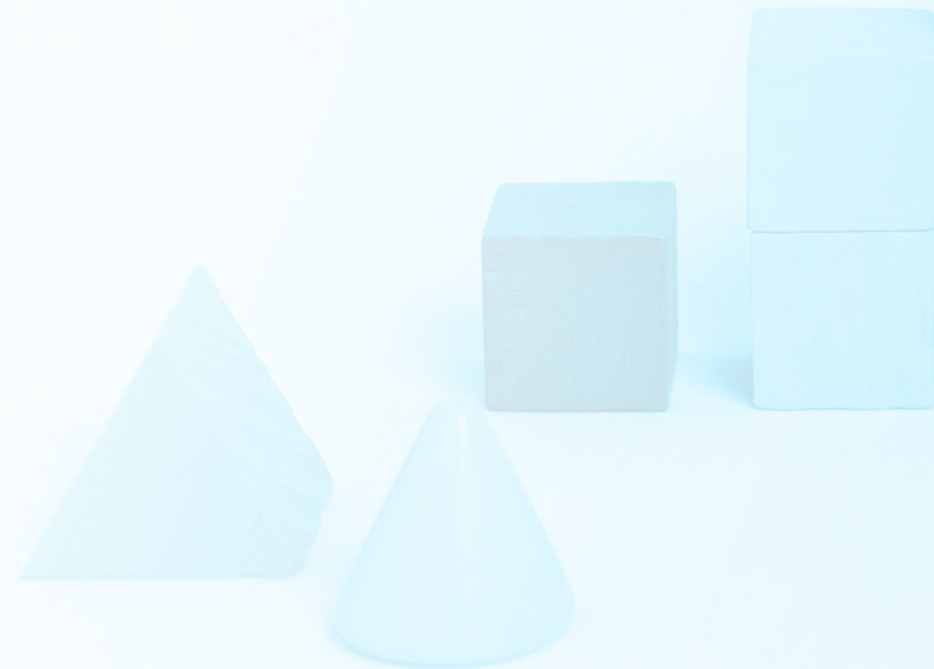
A 'one size fits all' strategy for sales coaching will leave a significant amount of revenue on the table.

In today's competitive business environment, organizations cannot afford to have their revenue goals impeded by ineffective coaching.

Individually tailored coaching might seem impossible, as team leaders only have so much time in the day to dedicate to coaching their reps. To effectively implement a truly effective coaching approach, managers need help. This is where tools like Ascent Cloud's LevelEleven come in.

With LevelEleven, managers have the insights they need to guide reps on an individual level to help their team reach high-level revenue goals. And better yet, reps will be motivated, engaged, and happy while striding forward.

Ascent Cloud makes it easy for managers to monitor the performance of each rep in real time. Managers can step in at the right moments, measure the effectiveness of their coaching, and ensure each rep gets the attention they need to flourish. There are a lot of complicated puzzles to solve in order to implement individually tailored coaching for each rep, but Ascent Cloud solves these challenges for you, and the outcomes are immensely valuable.

Learn more about Ascent Cloud