

Frontline sales manager coaching for an identity management software company



Challenge

After a merger, an identity management software company redefined its customer engagement methodology (CEM) and needed to prepare frontline sales managers to successfully coach their teams on what great looked like. In the methodology, they fused both the workforce and consumer sides of their business to show their customers that a unified identity solution could provide a better understanding of who their customer was across multiple websites.

At the end of 2021, the organization's next step was to prepare their frontline sales managers to coach the salesforce to be successful with the new methodology. The organization had a half day scheduled for these managers before their sales kickoff at the beginning of 2022. To achieve this goal, the company partnered with BTS to design a simulated version of a coaching conversation focused on the discovery and vision creation stages of the CEM.



Solution experience

BTS worked with the organization to design a three-hour workshop. BTS created a role-play simulation for the frontline sales managers to conduct a one-on-one session with a sales team member. This exercise was designed to train managers around appropriate questioning and feedback techniques and how to inspire behavioral changes in their teams.

The frontline sales managers underwent a self-paced training course to prepare for the experience. At the event, they applied their skills in the simulation and received feedback from the senior executives who were role-playing the sellers.

During the coaching session, four key elements were emphasized: sharing an effective deal study, understanding the potential impact of this deal, identifying the current gaps, and working collaboratively to take actions for improvement. The managers then practiced these aspects in a ten-minute phase, followed by two rounds of discussions focusing on their discovery and vision creation plan.

Feedback was given using a scorecard approach, ensuring consistency in assessment and providing a holistic picture of the organizational abilities. The scores were then compiled and returned to the client, along with additional insights.



Outcomes

The simulation experience refined the frontline sales managers' coaching skills and gave senior executives a broader understanding of the company's capability levels. The simulation was not solely about coaching the managers but engaging them to launch the CEM initiative strategically. As a result, the client achieved their goal of ensuring managers could drive behavior change and align their teams with the new initiative, allowing rapid implementation. Consequently, even during typically challenging periods, such as the year's end, the team could move quickly and effectively from the first week of sales.



Client quotes



It is now integral to every weekly forecast call to RVP and every forecast call to Sales Directors. It is still part of the change management process as it rolls out with required rigor across all sales teams.

