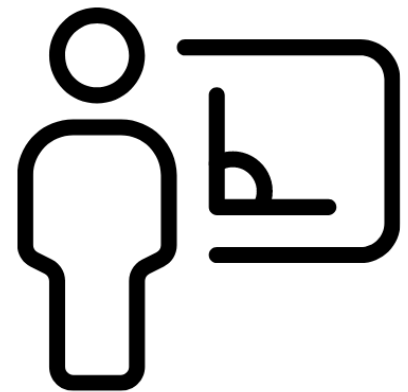


Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



Coaches are aware of how to ignite passion and motivate people. They have an energy that is contagious and know exactly how to get their team excited.

Brian Cagney

Module Two: What Is a Coach?



Before it is possible to implement any coaching activities, the definition of a coach must be made clear. Understanding the roles and responsibilities of coaching as well as the challenges that coaches face, will establish the foundation necessary for moving forward in the process of becoming a coach for salespeople.

Be a Coach



In the business world, a coach is responsible for increasing employee and company success. The goal of coaching is to develop employees at all levels, including productivity, adaptability, satisfaction, and retention. There are professional coaching positions, but any manager can be a coach who develops the best in their employees.

Coaches are not mentors, although they share some of the same roles. Coaches work to help people discover information on their own rather than relying on direct teaching methods. In any coaching relationship, it is necessary to develop trusting relationships based on confidentiality.

Estimated Time	7 minutes
Topic Objective	Review the definition of a coach.
Topic Summary	Be a Coach

	Discuss the definition of a coach.
Materials Required	Flipchart/board, marker
Planning Checklist	None
Recommended Activity	As a group, discuss your understanding of coaches and coaching. What impact do you feel coaches can have on teams? List the ideas on the flipchart/board.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What is a coach responsible for?

Roles



Being a good coach demands a clear understanding of the roles and responsibilities that a coach must provide. These roles include:

- Challenge assumptions – Ask team members to consider their beliefs.
- Offer encouragement – Celebrate achievements and build confidence in times of struggle.
- Provide education – Help team members find skills, knowledge, and expertise.
- Act as counselor – Develop interpersonal relationships between team members and those outside the team.

These roles that a coach plays require balance. It is important to avoid focusing so much on one role that you fail to address others.

Estimated Time	8 minutes
Topic Objective	Consider the roles of a coach.
Topic Summary	Roles Discuss the roles of a coach.

Materials Required	Flipchart/board, marker
Planning Checklist	None
Recommended Activity	What are some other roles that a coach may play? Brainstorm ideas as a group. List responses on the flipchart/board.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What must a coach understand?

Responsibilities



The coach is responsible for guiding and supporting the team. Responsibilities extend to specific activities such as:

- Maintain the team's focus on a common goal
- Assist the team in different processes and provide support
- Monitor progress
- Give effective feedback diplomatically

These are not the only responsibilities that coaches have. Remember not to take on too much. Your responsibilities need to support your roles. When you go beyond this, you risk overextending yourself.

Estimated Time	8 minutes
Topic Objective	Review responsibilities.
Topic Summary	Responsibilities Discuss the different responsibilities.
Materials Required	Worksheet 1: Responsibilities
Planning Checklist	None.

Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the group.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What is the coach responsible for?

Face Challenges



There are common challenges coaches face when they are working with their teams. Many of these challenges become risks when coaches fail to address them. We will discuss risks later in the course.

- There is a lack of trust in relationships – Be honest and sincere in relationship building.
- Failure of individuals to come to their own conclusions – Allow them to struggle without interfering.
- Dependent team members – Do not allow team members to use you to solve all their problems.
- Uncommitted team members – Have members develop goals, and cut them if they refuse to engage.
- Lack of respect – Maintain boundaries to prevent members of the sales team from losing respect for your position.

Estimated Time	8 minutes
Topic Objective	Review facing challenges.
Topic Summary	Face Challenges Discuss facing challenges.
Materials Required	Flipchart/board, marker

Planning Checklist	None
Recommended Activity	As a group, the different challenges that customers face. What would be examples of each challenge listed? Place ideas on the flipchart/board.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What becomes risks?

Practical Illustration



Kate was a new coach for her sales team. She attempted to become friends with her team in order to develop trusting relationships with them. She soon discovered that it became difficult for her to maintain order with her team. Some of them became very dismissive of her advice and ignored her ideas. She decided to contact her friend and mentor, Helena, to get advice. Helena explained that she failed to maintain boundaries. She lost the respect of her team for her positions. She was just another friend giving helpful advice.

Module Two: Review Questions

1.) What is not a coach's role?

- a) Mentor
- b) Guide
- c) Develop
- d) None of the above

Coaches are not mentors, although they share some of the same roles. Coaches work to help people discover information on their own rather than relying on direct teaching methods.

2.) What is the goal of coaching in development?

- a) Productivity
- b) Adaptability
- c) Satisfaction
- d) All of the above

In the business world, a coach is responsible for increasing employee and company success. The goal of coaching is to develop employees at all levels, including productivity, adaptability, satisfaction, and retention.

3.) Who do coaches develop relationships between?

- a) The public
- b) Team members and those outside
- c) Vendors
- d) Customers

Coaches act as counselors. They develop interpersonal relationships between team members and those outside the team.

4.) What is necessary for the coaching in different roles?

- a) Focus
- b) Single specialty
- c) Balance
- d) All of the above

The roles that coaches play require balance. It is important to avoid focusing so much on one role that you fail to address others.

5.) How should feedback be given?

- a) Quickly
- b) Easily
- c) Diplomatically
- d) Creatively

One of the responsibilities of the coach is giving feedback. This feedback must be given diplomatically.

6.) What occurs when coaches go beyond their responsibilities?

- a) Progress
- b) Development
- c) Overextended
- d) Improve goals

These are not the only responsibilities that coaches have. Remember not to take on too much. Your responsibilities need to support your roles. When you go beyond this, you risk overextending yourself.

7.) What should be done if members refuse to engage and commit?

- a) Develop goals
- b) Cut them
- c) Solve problems
- d) Nothing

Uncommitted team members are a risk. Have members develop goals, and cut them if they refuse to engage.

8.) What is necessary for building trust?

- a) Sincerity
- b) Honesty
- c) Challenge
- d) A & B

A lack of trust in relationships is a challenge in coaching. Honesty and sincerity will help build trust in relationships.

9.) What must a coach clearly understand?

- a) Roles
- b) Responsibilities
- c) A and B
- d) Nothing

Being a good coach demands a clear understanding of the roles and responsibilities

10.) A coach should not _____.

- a) Solve other's problems
- b) Act as a friend
- c) Nothing
- d) A & B

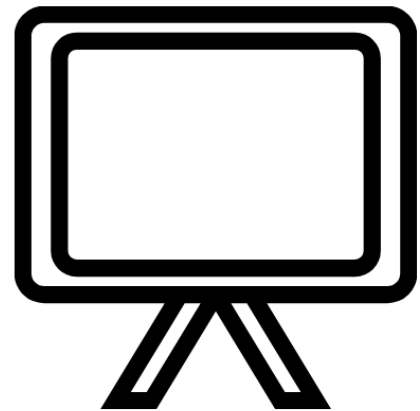
Dependent team members – Do not allow team members to use you to solve all their problems

PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.





“

Coaches are aware of how to ignite passion and motivate people. They have an energy that is contagious and know exactly how to get their team excited.

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MODULE TWO

What Is a Coach?

Understanding the roles and responsibilities of coaching as well as the challenges that coaches face will establish the foundation necessary for moving forward in the process of becoming a coach for salespeople.



Be a Coach

In the business world, a coach is responsible for increasing employee and company success.

Roles

- Challenge assumptions
- Offer encouragement
- Provide education
- Act as counselor





Responsibilities

- Maintain the team's focus on a common goal
- Assist the team in different processes and provide support
- Monitor progress
- Give effective feedback diplomatically

Face Challenges

Some challenges can become risks when coaches fail to address them.



Practical Illustration



- Be a Coach
- Roles
- Responsibilities
- Face Challenges

Module Two: Review Questions

1. What is not a coach's role?

A. Mentor

B. Guide

C. Develop

D. None of the above

Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



Coaching Salespeople Quick Reference Sheet



Takeaways

Most coaching sessions will include takeaways, which are key points that the team members need to remember. Prepare ahead of time and consider how the takeaways are related to the goals of the team. The best way to provide takeaways is visual. Do not just rely on verbal communication.

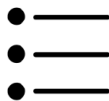
Print up takeaways.



Consider using slides to share main points.



Include sub-points when necessary.



Use images if useful.



Additionally, make sure to hand out the takeaways at the end of the coaching sessions, and answer any questions that team members may have before they leave.

Coaching vs Training

Coaches are not trainers. To be effective as a coach, it is necessary to understand the difference between the two. Each one serves a different purpose. Training is used to teach specific skills and information. Trainers have basic roles.

- Drive learning.
- Direct the content for learning.
- Control group process.

Coaches, on the other hand, work differently to provide guidance. They:

- Use questions to drive learning.
- Focus on two-way communication.
- Do not use specialized content.
- Work one-on-one.

Acknowledge Success

The success of every team member should be acknowledged and celebrated. It is easy to celebrate the large successes like big sales or community awards, but don't forget to acknowledge the small successes. Praise small movements toward goals, such as a small increase in sales. Let other team members know about improvements so that the community can celebrate. If you acknowledge small successes, you will build confidence and continue to improve success.



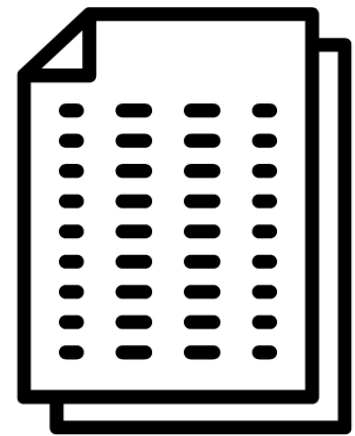
Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



Sample Worksheet 1

Responsibilities

What actions would be necessary to perform the responsibilities of a coach?

Notes: _____

Icebreaker: A New Leader

PURPOSE

To help participants get acquainted and start talking to each other.

MATERIALS REQUIRED

1. Index cards

PREPARATION

Write the name of a different famous person on five or six index cards. Some examples: Madonna, Tiger Woods, Lance Armstrong, Nelson Mandela, Bill Gates, Angelina Jolie, Elliot Page.

Divide participants into groups of four to six. Give each group one of the cards.

ACTIVITY

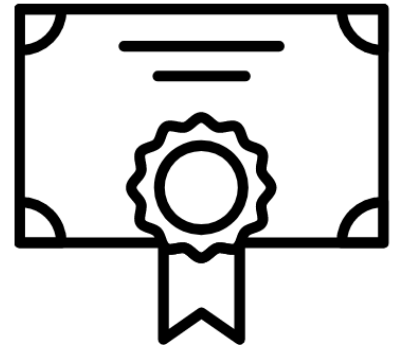
Tell participants that the president of their company (or the head of their department) has resigned and the position is now being taken over by the person on their index card. Ask each group to think of one characteristic of this person that will help them do well in this new role.

After a few minutes, ask the groups to report on what they decided.

Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

[Name]

*Has mastered the course
Coaching Salespeople*

Awarded this _____ day of _____, 20____

Presenter Name and Title
