

INBOUND

HOW TO APPLY A COGNITIVE BEHAVIORAL APPROACH TO SALES COACHING

Carole Mahoney

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AGENDA

for the next 29 minutes

6:00

WHAT & WHY



ENGAGE

8:00

8:00

APPLY



CHANGE

8:00

30:00

QUESTIONS



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**\$70 BILLION
SPENT IN SALES TRAINING**

~HBR, 2017

54.3% made quota

~CSO Insights, 2018

"Why doesn't training stick?"

~Your boss



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5 REASONS WHY

training doesn't stick



FORGETTING CURVE

1 hour= 50 % info
forgotten



DUNNING-KRUGER EFFECT

Bias of our own
strengths &
weaknesses



COGNITIVE DISSONANCE

Gap in reality and
beliefs



PASSIVE RECALL

Sit, listen, and watch
learning



REASONED ACTION

What and how we
think directly impacts
behaviors

THE BEHAVIOR CHAIN

Where training alone breaks down



TRIGGER

I have to make calls

THOUGHT

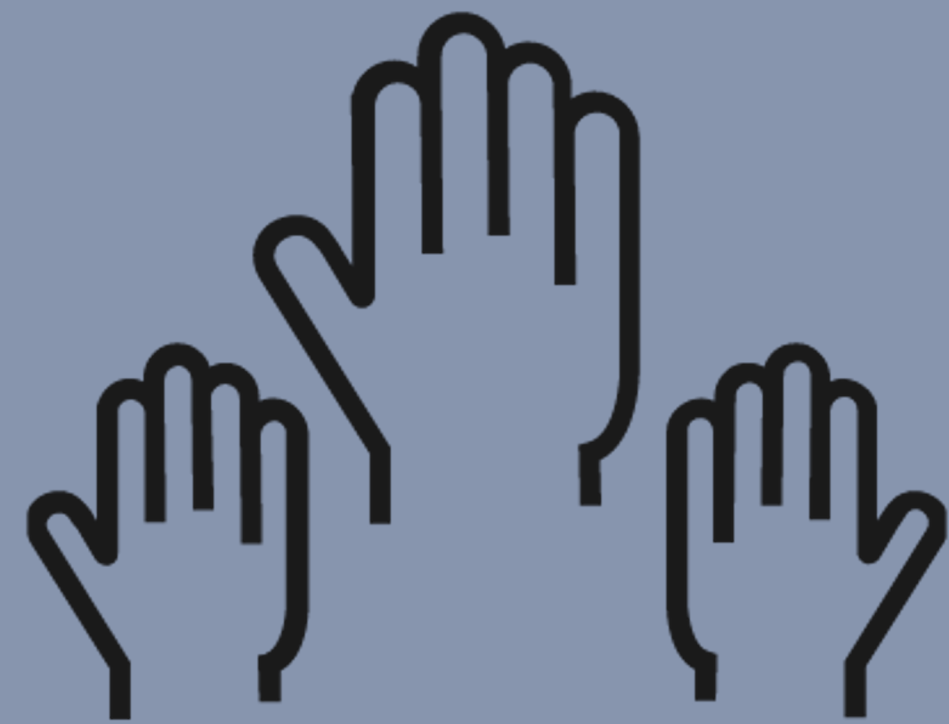
No one wants to hear
from me

ACTION

Put off making calls

RESULT

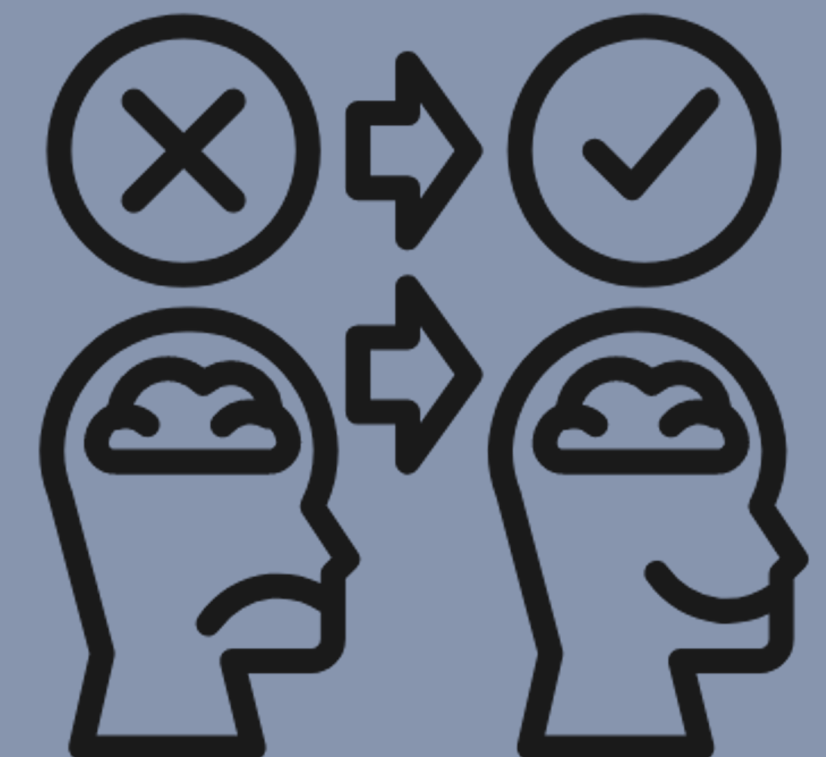
Skinny pipeline



ENGAGE



APPLY



CHANGE



ENGAGE

HOW TO GET SELLERS AND MANAGERS TO
OPT INTO AND ENGAGE IN TRAINING AND
COACHING VIRTUALLY

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298%

**More likely to be elite sellers with personally
meaningful goals**

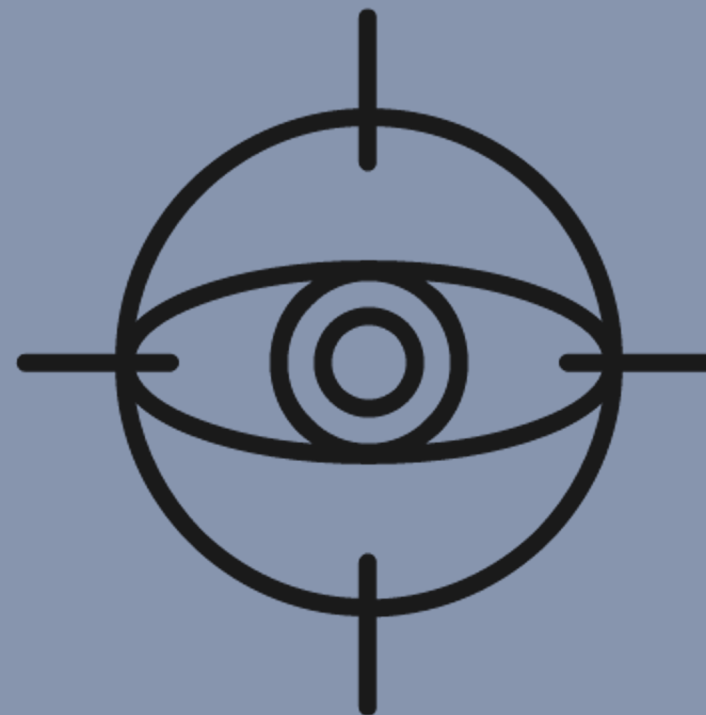
3 STEPS

TO ENGAGE SALES TEAMS IN TRAINING & COACHING



PERSONALLY MEANINGFUL GOALS

5 steps for managers & sellers



OBJECTIVE EVALUATIONS

Minimize the bias and uncover thought patterns



INDIVIDUAL ACTION PLANS

Collaborative training & coaching programs

1

5 STEPS TO PERSONALLY MEANINGFUL GOALS

A Dominican University study indicated that those who follow these 5 steps are significantly more likely to reach their goal.



5 STEPS

TO CREATE & ITERATE PERSONALLY MEANINGFUL GOALS



THINK

visualize the future in detail



WRITE

make it real



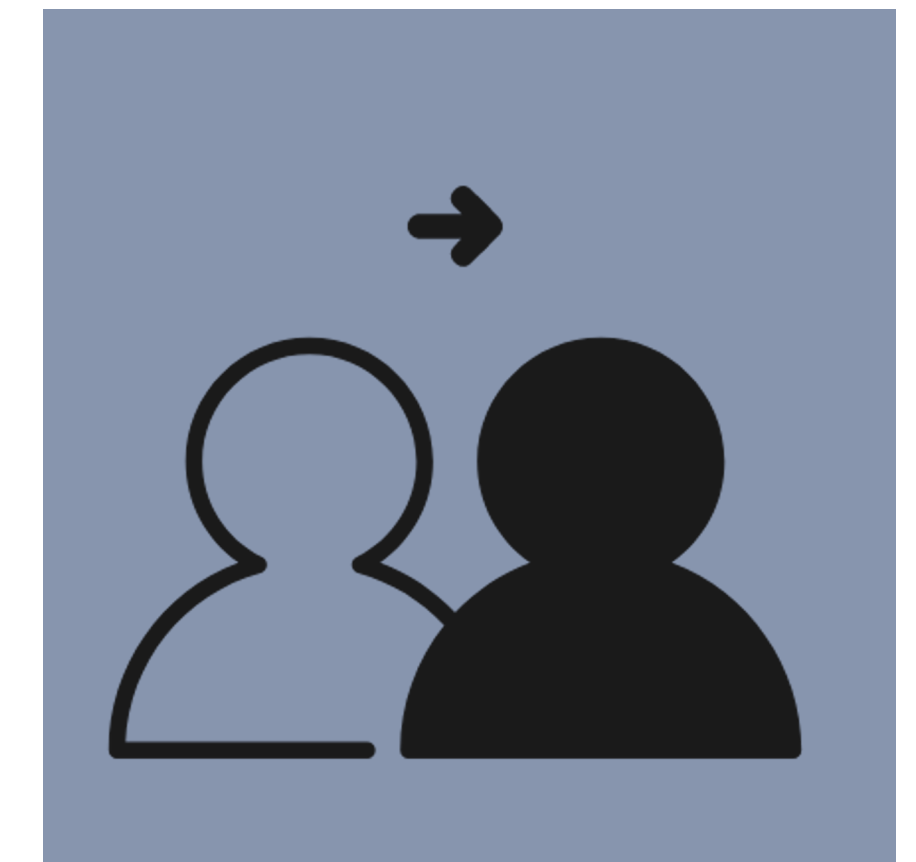
COMMIT

actions necessary to reach
the goal



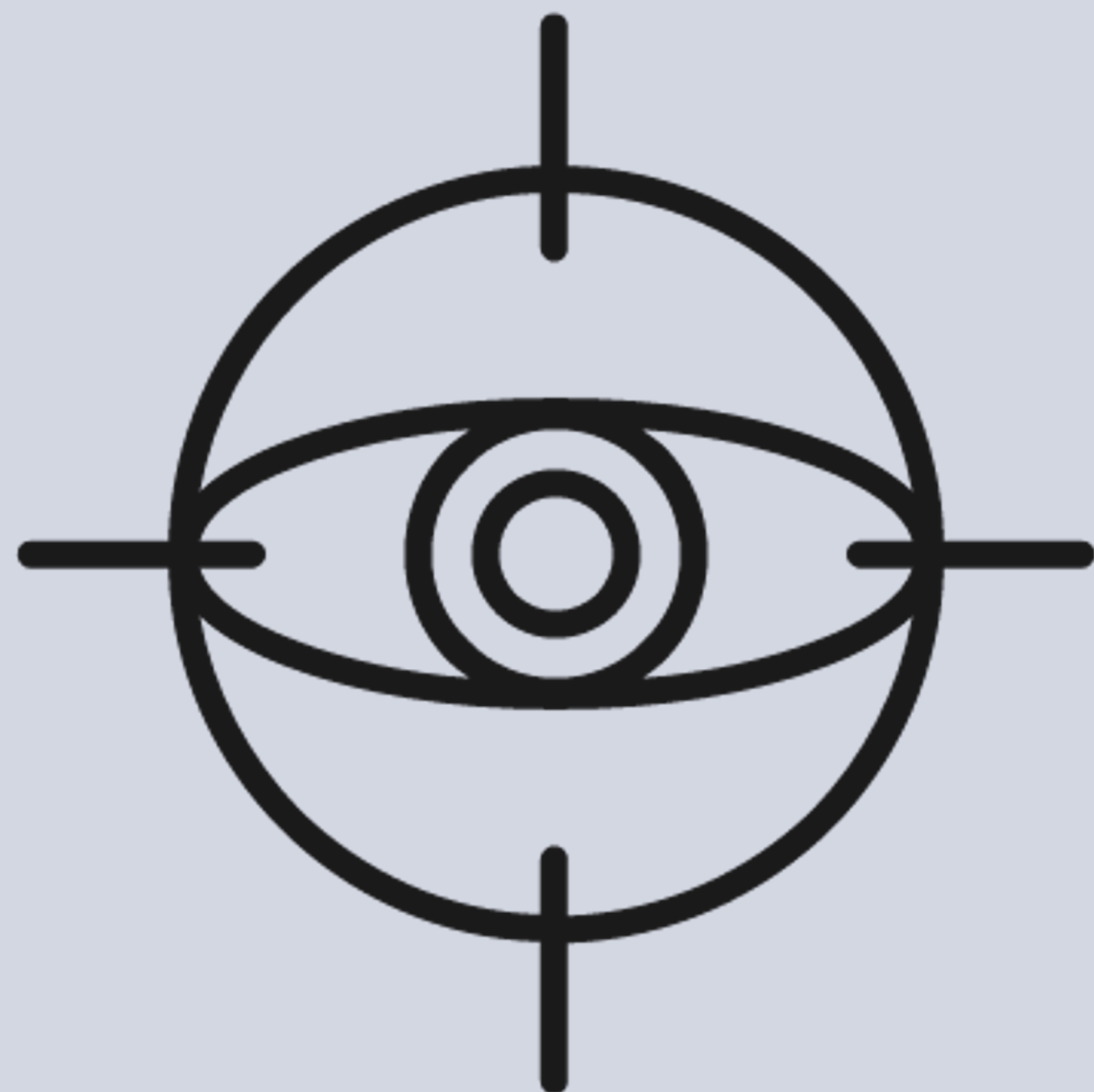
SHARE

with a support network



REPORT

make accountability happen



2

SALES ROLE SPECIFIC

OBJECTIVE EVALUATION

Personality and behavioral tests may be subject to the Barnum Effect. Evaluations should be directly tied to on the job performance for EEOC compliance.

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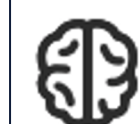
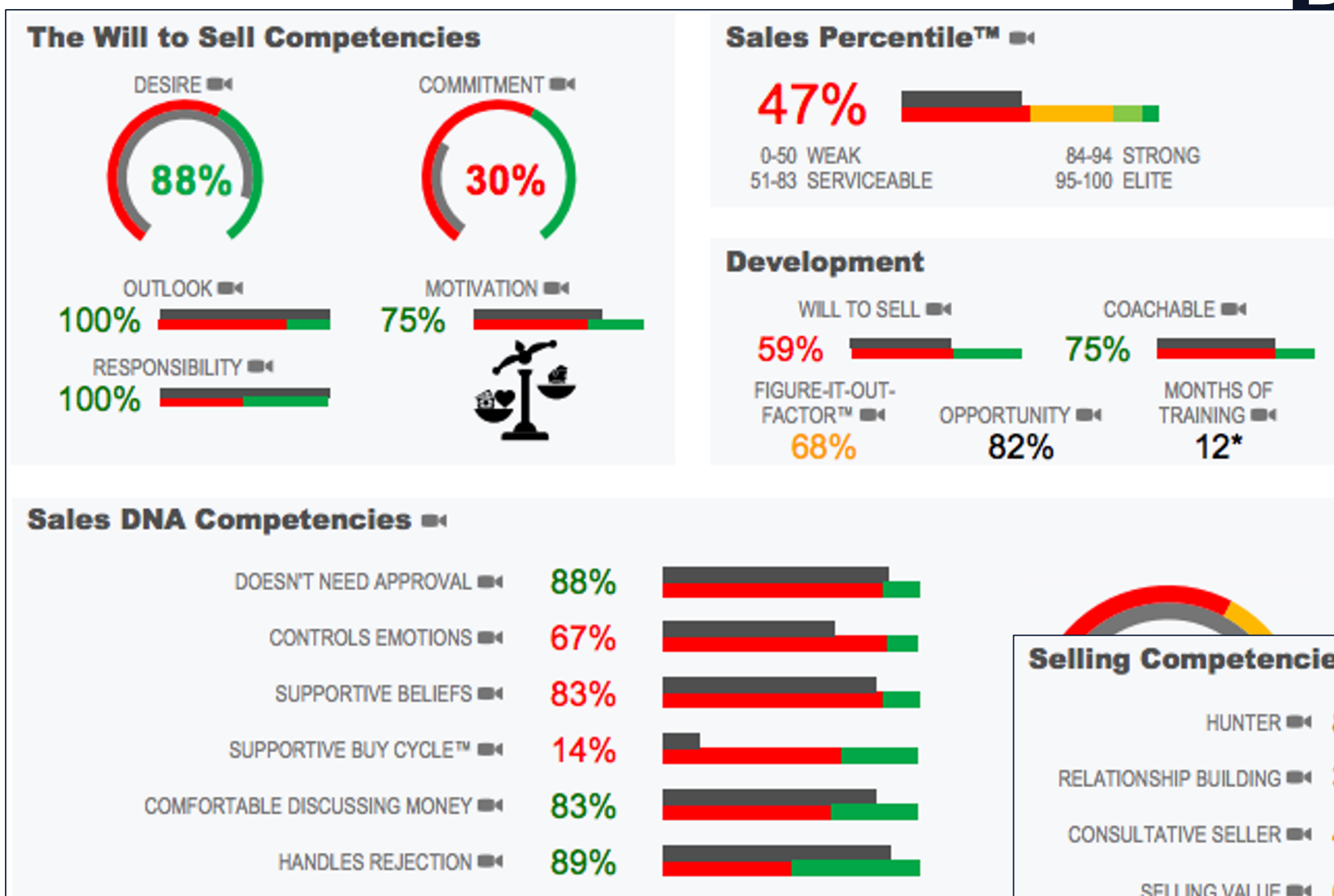
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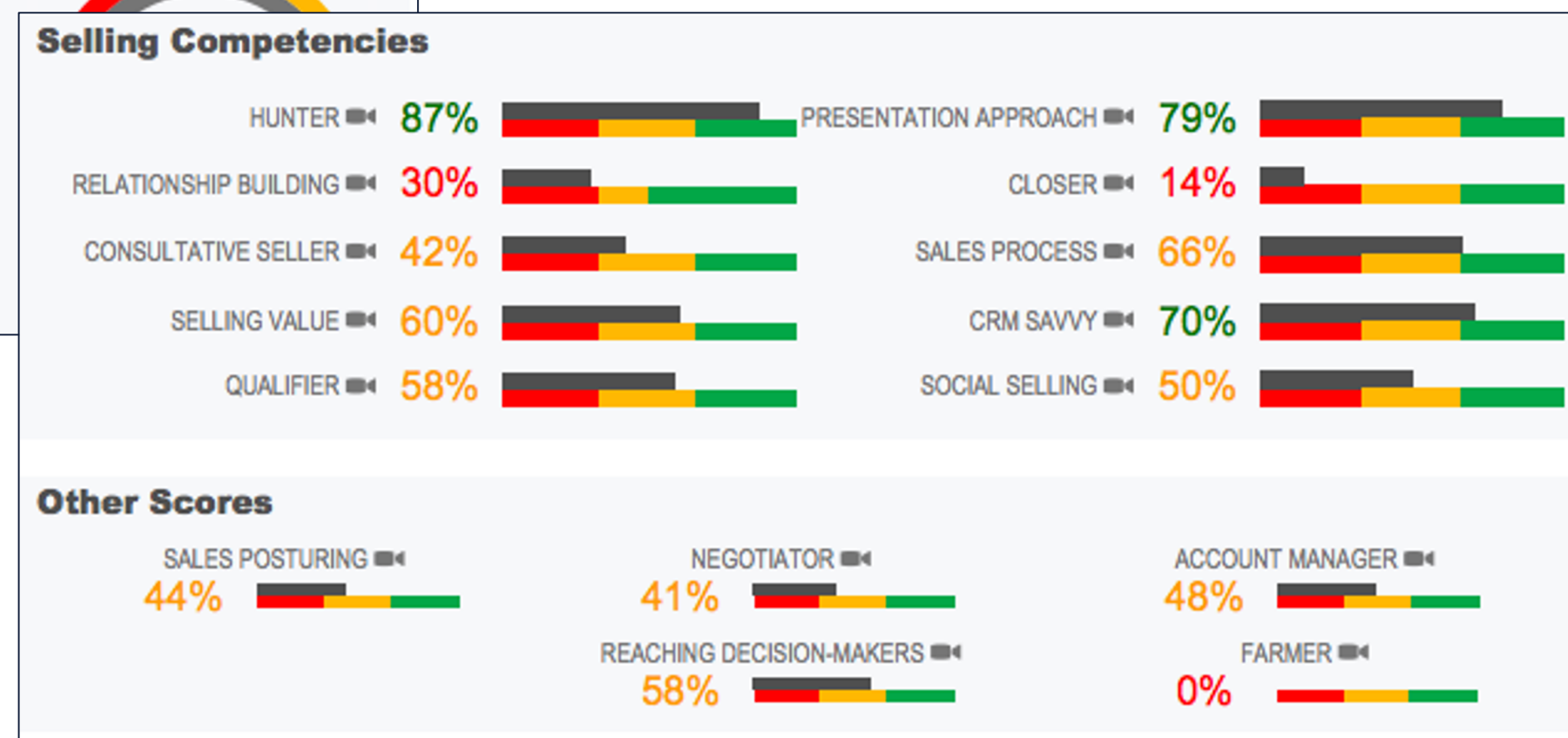
DATA DRIVEN

SALES SPECIFIC



BELIEFS

- ✗ A thousand dollars is a lot of money
- ✗ I understand when my prospects want to comparison shop
- ✗ I need to educate my prospects
- ✗ I have a long sales cycle
- ✗ If prospects are happy with their current vendor then I can't help them
- ✗ Prospects are honest
- ✗ It is appropriate to spend significant time with prospects that don't buy from me
- ✗ A personal sales plan isn't that important to me



1.9 MILLION SALES PROFESSIONALS

On over 282 attributes



200 INDUSTRIES

Primarily B2B



131 COUNTRIES

Global application



28 YEARS

Independently validated to be predictive of on the job performance

Source: Objective Management Group

3

MANAGER / SELLER COLLABORATIVE

INDIVIDUAL ACTION PLANS (IAP)

Involve trainees / coachees in their learning and development plans to apply the Adult Learning Theory and back-chain learning.



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Sales Strengths (DNA) to be improved on	Its Effect on Performance	Your Plan for Improvement
Recovering from rejection	Decreases the amount of effective outreach because I take it personally instead of using those moments as a learning opportunity.	Acknowledge the prospect isn't rejecting me personally and instead look at the situation objectively. Was my messaging off? What is a bad time? What can I do differently?
Does not need to be liked	Prevents me from asking tough questions and pushing back on the contact when necessary. This plays a role in all aspects of the sales cycle and can hinder the ability to book a meeting, schedule a next step, or close a deal.	Increase self awareness and notice moments when I'm bothered by someone not liking me. Use that moment as an opportunity to ask why does it matter? Will my life change based on their opinion? Write these situations down and explore the idea of loving myself first.

Skills to develop and learn	Its Effect on Performance	Your Plan for Improvement
System to track progress	No suggestion on adjustments that should be made in order to reach my goals. Lack of clarity of where and when I need to improve throughout the sales cycle.	Become self aware of areas of improvement in each aspect of the sales cycle. Create a list of goals and then celebrate small wins as I progress. Hold myself accountable by working with colleagues on my stage of development.
Sales Process	Lack of consistency and overall confusion of what is happening with opp's in the pipeline.	Create an effective sales process with my team that has guidelines for each milestone. Ensure that the milestones occur on each call.

Self-Limiting Beliefs	Its Effect on Performance	Your Plan for Improvement
I prefer not to make cold calls	Not as prepared for rejection as well as objections from prospects. Pipeline is not as full as it should be.	Create a prepared call list of 30 contacts prior to the day. Test different rebuttals for objections to see what's working well.
Prospects that think it over will eventually buy from me	Opportunities are not qualified and stay stagnant in the pipeline.	Ask the right questions to see where prospects are in the buying process. Communicate concisely about next steps.
I'm uncomfortable with certain aspects of selling	Since I'm handling all aspects of the sales cycle they're multiple areas where being uncomfortable can prevent the sales.	Identify the areas where I'm uncomfortable starting with the first stages of the cycle. Set one goal at a time and move to the next stage of the cycle.



TRIGGER & THOUGHT AWARENESS

Using their evaluation, the coachee indicates area of improvement.



RESULTING BEHAVIOR

The coachee identifies resulting behavior to change.



PLAN FOR BEHAVIOR CHANGE

Coachee commits to an action plan to change behavior.



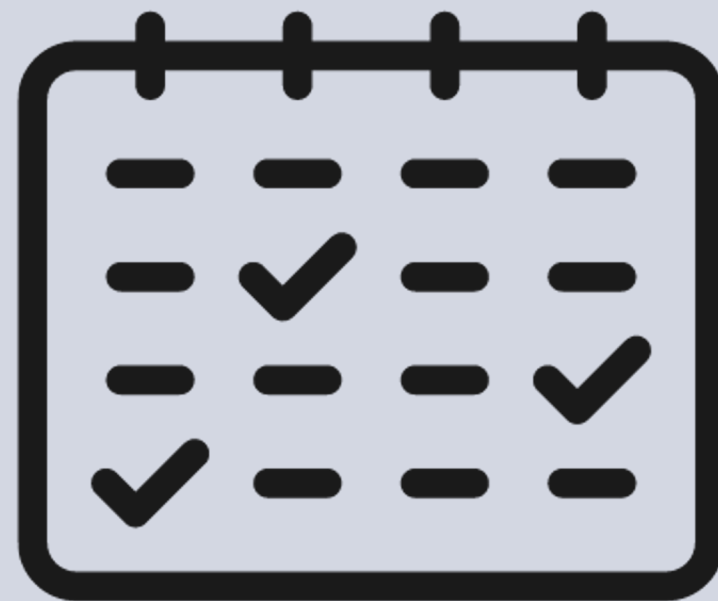
APPLY

HOW TO COACH SELLERS AND MANAGERS TO
APPLY THE KNOWLEDGE THEY HAVE LEARNED

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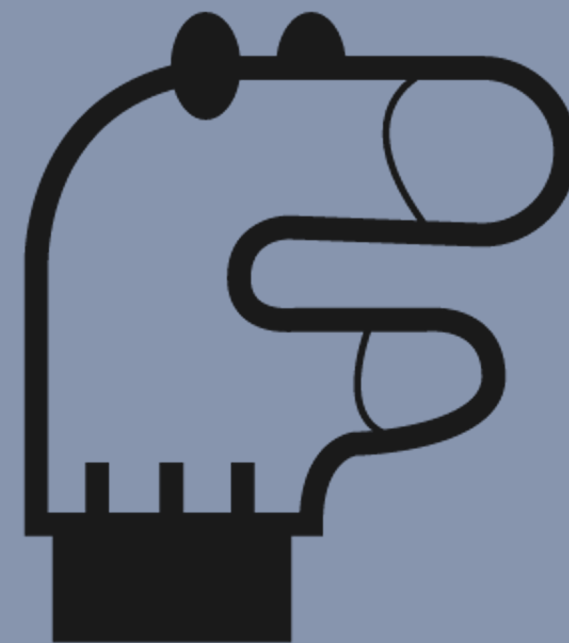
3 COMPONENTS

TO HELP SALES TEAMS APPLY NEW KNOWLEDGE



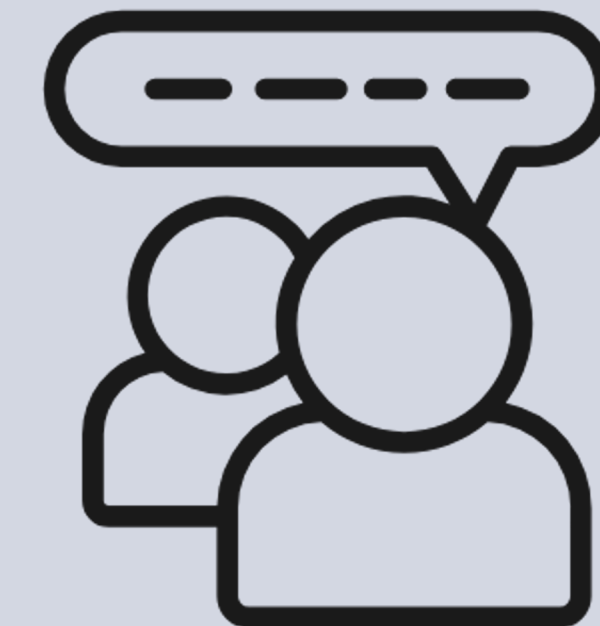
FREQUENCY/ LENGTH

OFTEN & SHORT



CONTEXT

REAL WORLD



1:1

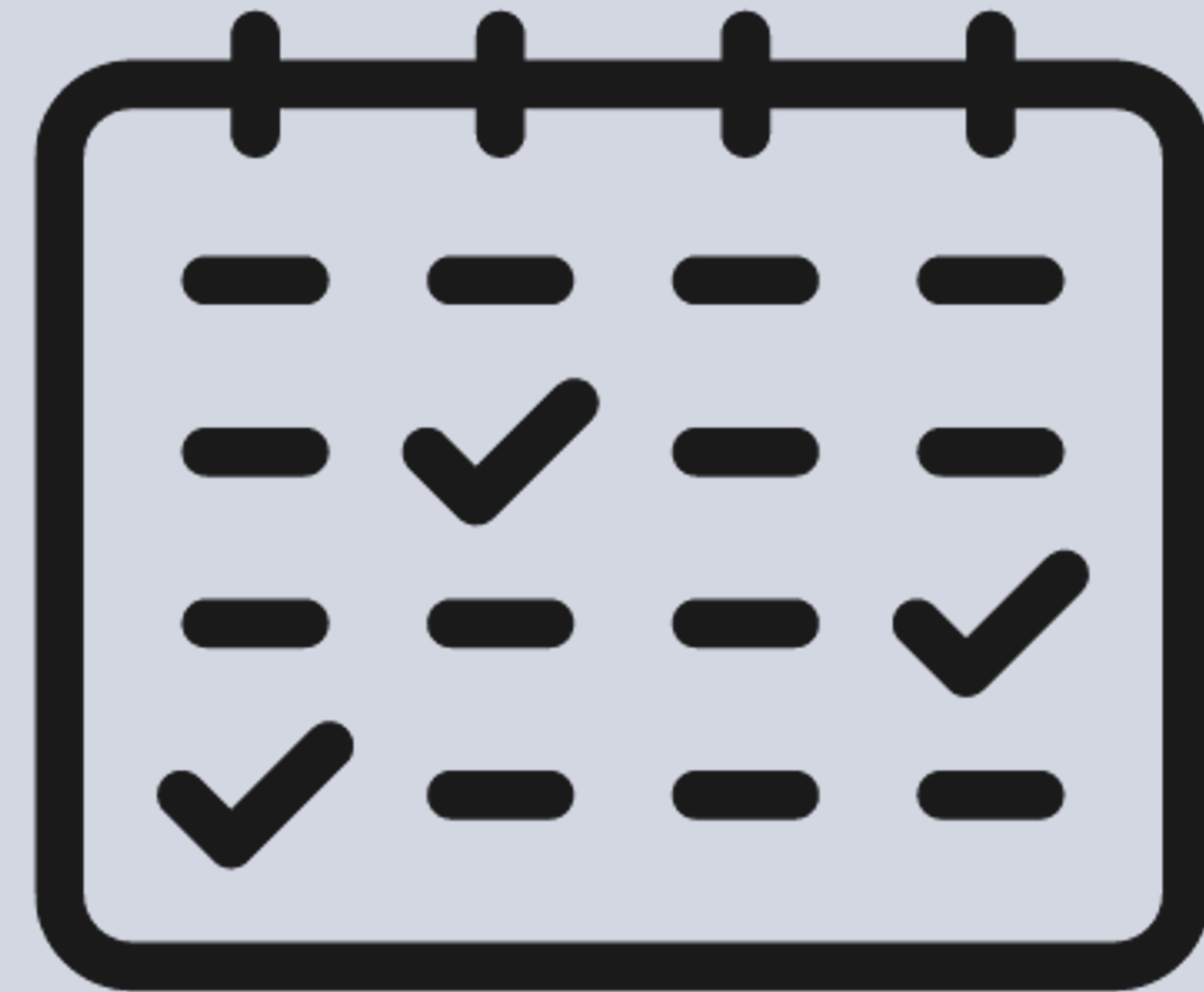
COACHEE DRIVEN

1

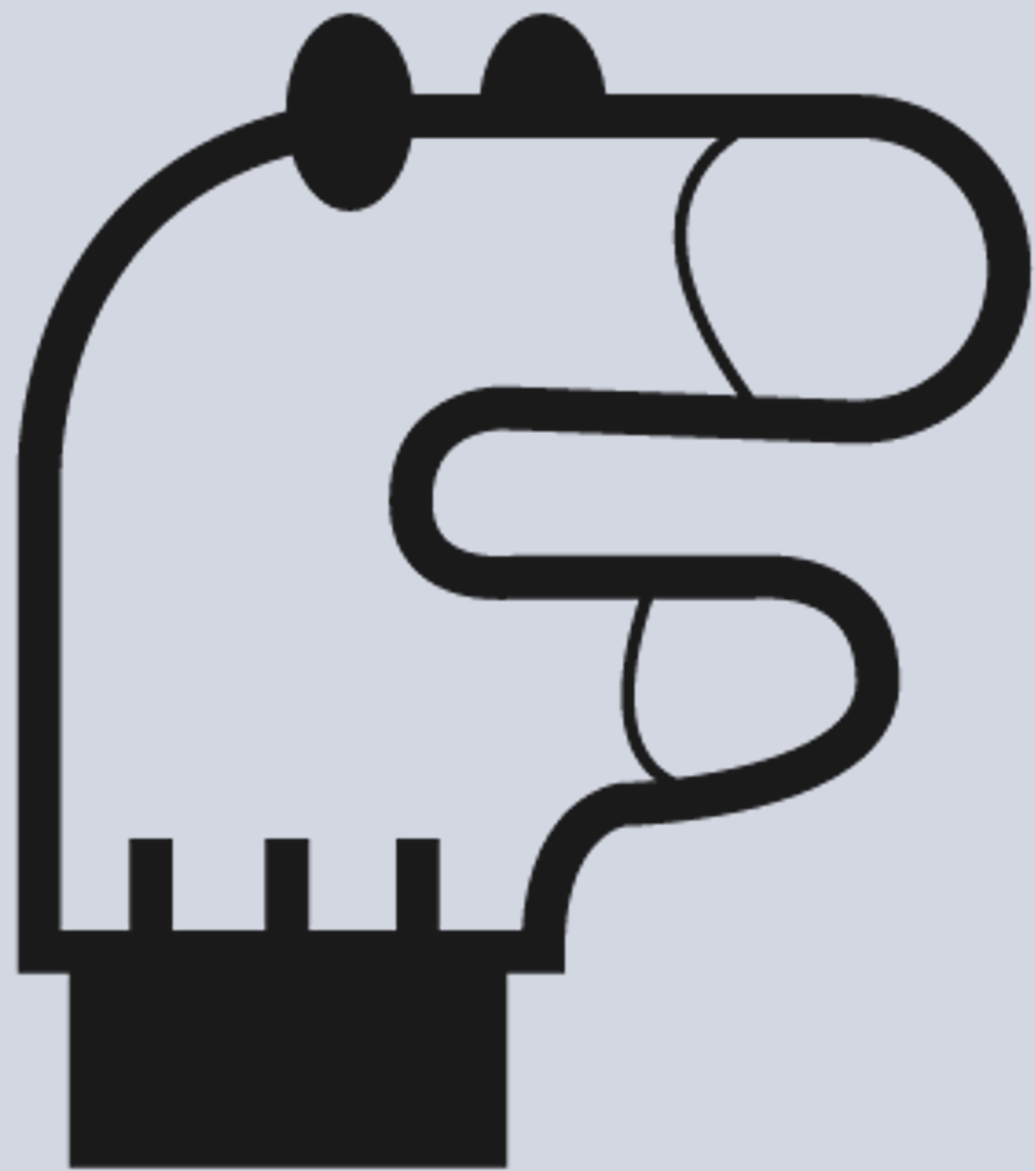
COACHING

FREQUENCY & LENGTH

Information overload in coaching happens when too much irrelevant information is dumped on a coachee. This happens often hour long coaching sessions that only happen once a week.



	MON	TUE	WED	THUR	FRI		
8:00	Daily prep	Daily prep	Daily prep	Daily prep	Daily prep		
8:30	team huddle	team huddle	team huddle	team huddle	team huddle		COACHING
9:00		Call reviews		Call reviews			ACCOUNTABILITY
9:30		Call reviews		Call reviews			MOTIVATING
10:00	1:1 goal session	Call reviews	1:1 coaching	Call reviews	1:1 coaching		RECRUITING
10:30	1:1 goal session	Call reviews	1:1 coaching	Call reviews	1:1 coaching		
11:00	1:1 goal session		1:1 coaching		1:1 coaching		8 salespeople
11:30	1:1 goal session		1:1 coaching		1:1 coaching		
12:00	team lunch & learn	Group coaching		Group coaching			
12:30							
1:00	1:1 goal session		1:1 coaching		1:1 coaching		
1:30	1:1 goal session		1:1 coaching		1:1 coaching		
2:00	1:1 goal session		1:1 coaching		1:1 coaching		
2:30	1:1 goal session	Call reviews	1:1 coaching	Call reviews	1:1 coaching		
3:00	Strategy meeting	Call reviews		Call reviews	Activity & Performance reports		
3:30		Call reviews		Call reviews			
4:00		Call reviews	Team building exercises	Call reviews			
4:30	Comp review	Hiring Event	Interviews	Networking Event	Team happy hour		
5:00							
5:30			Interviews				



2

COACHING CONTEXT

Personality and behavioral tests may be subject to the Barnum Effect. Evaluations should be directly tied to on the job performance for EEOC compliance.

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00:00 / 35:43

⏮ ⏪ ⏩ ⏭

00:05:30

Start of call- layer 1

+ - ★

×

00:05:43

Great emotional control and simple open ...

+ - ★

×

00:05:58

another good open ended question

+ - ★

×

00:06:42

Listen and ask

+ - ★

×

00:07:09

'who is in charge of this call anyway?'

+ - ★

×

Feedback

Insight

Collaborate

Share

Questions Asked

Number of questions per call

Marisa asks 24 questions on average.

Marisa 24

How many questions does each rep ask? Our AI algorithms identify questions to report on how many are asked, on average, per call.

Questions Per Call Quartile

Questions asked by rep per quartile of calls

Marisa 3 8 6 7

q1 q2 q3 q4

Marisa asks a higher number of questions in the 2nd quarter of calls.

Of the questions asked, where in the call were they asked? We break down each call into 4 equal sections (quartiles), to see whether questions occur more frequently in certain parts of the rep's conversations, and how that differs from peers.

Filler Terms

Rep's top filler terms identified vs peers

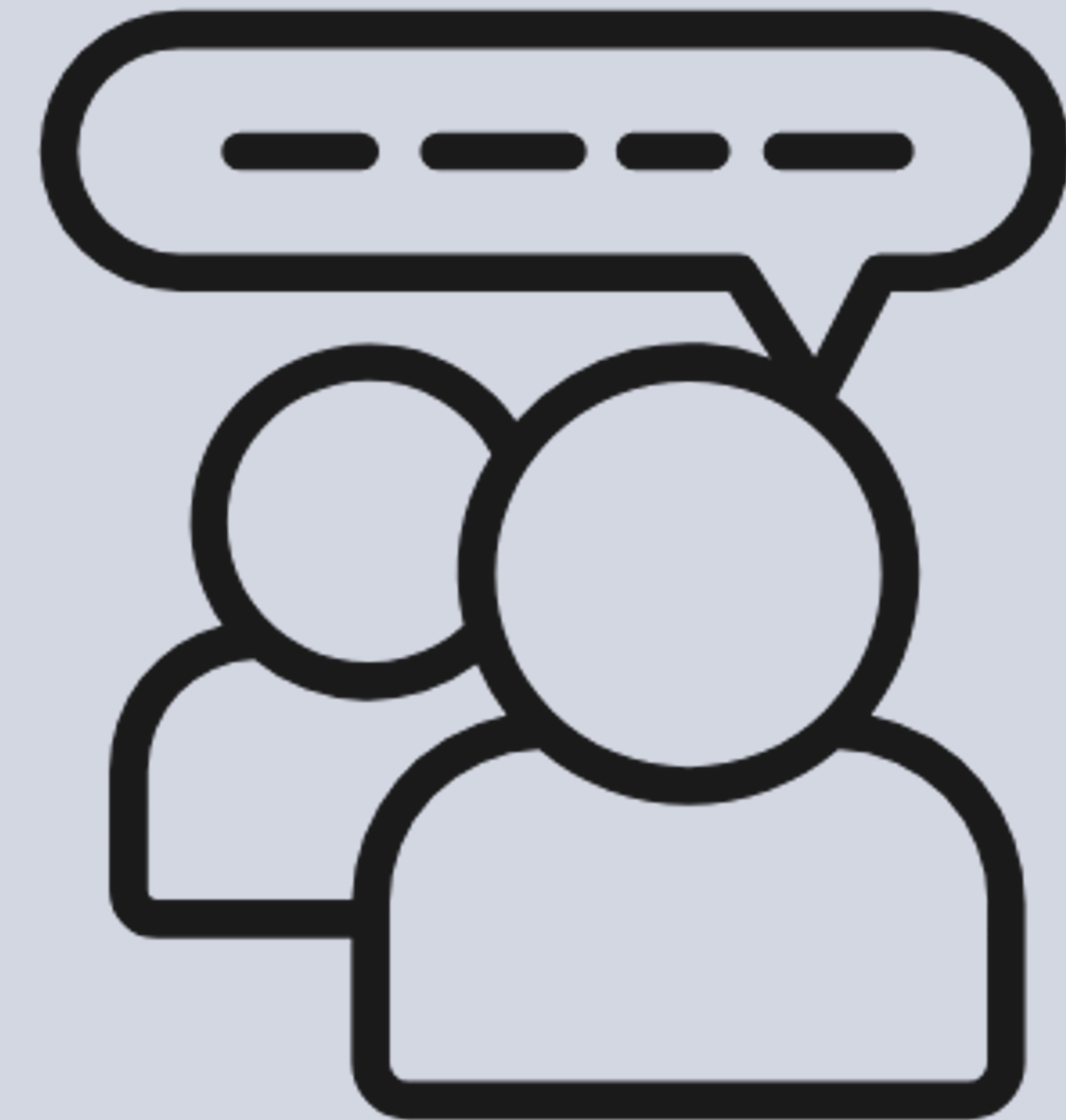
'Just', 'really', 'so', 'well' and 'you know' are Marisa's most used terms

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COACHING

1:1 SESSIONS

Involve trainees / coachees in their learning and development plans to apply the Adult Learning Theory and back-chain learning.



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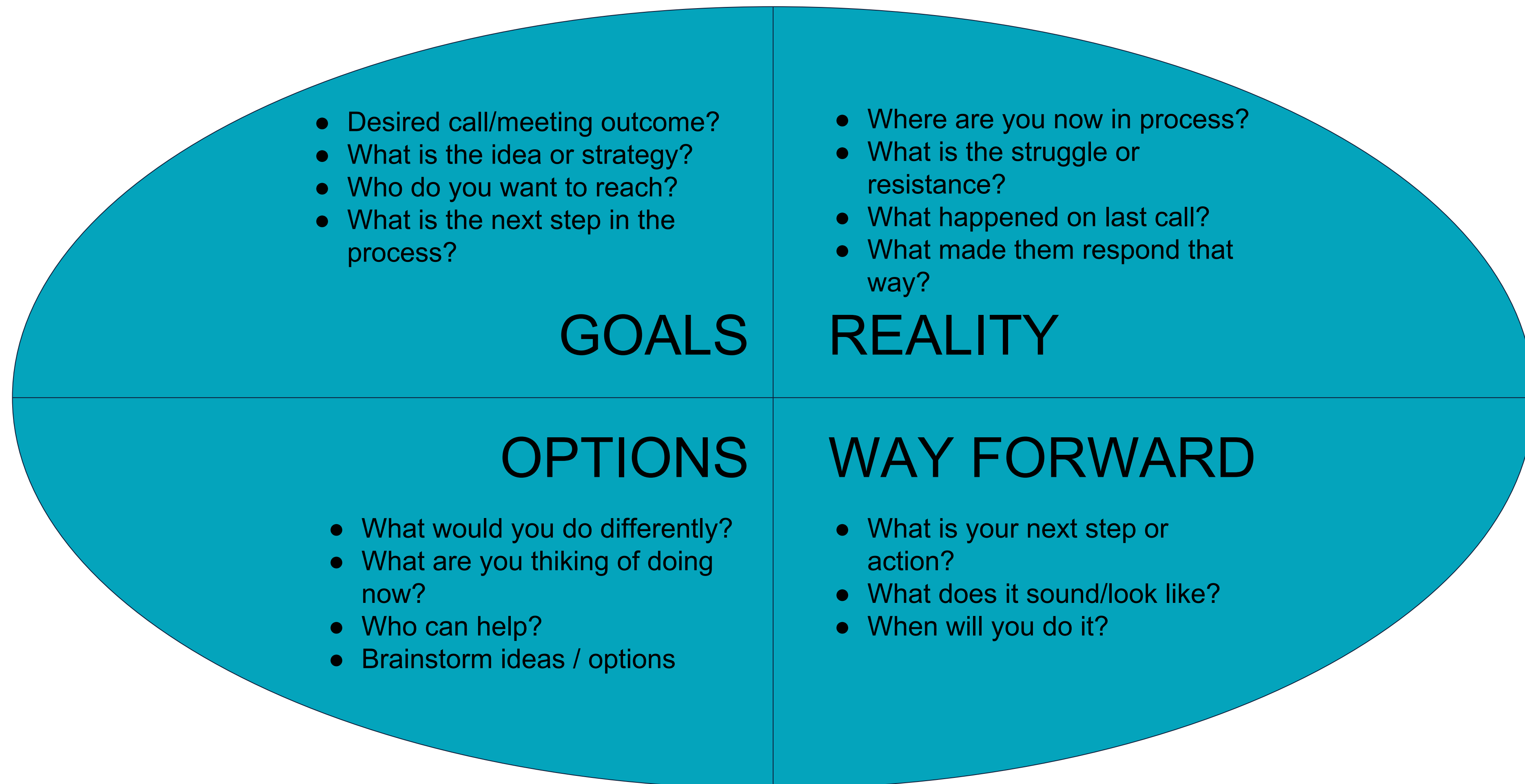
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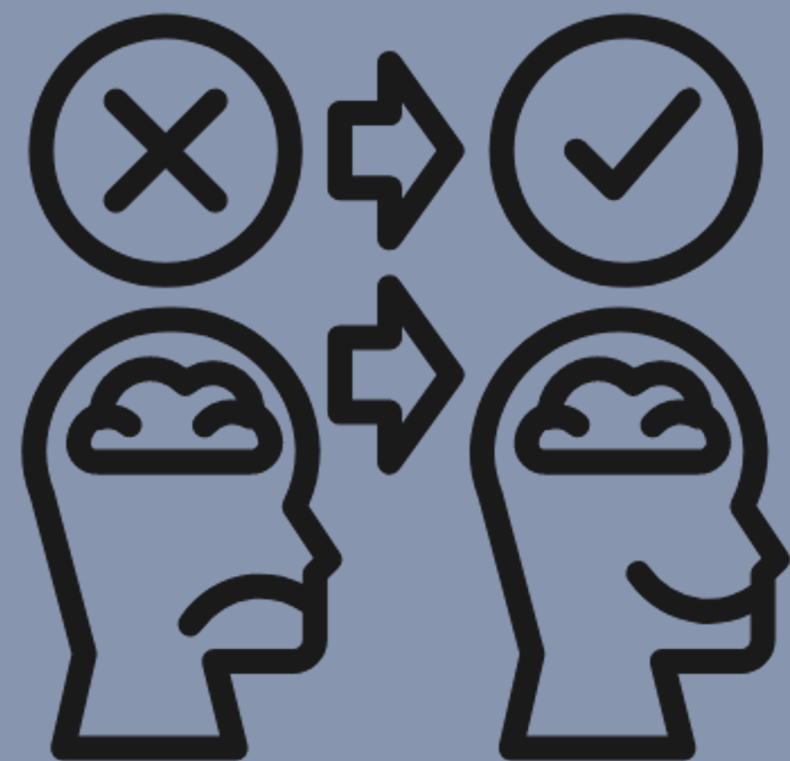


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G-R-O-W

COACHING MODEL FOR 1:1s





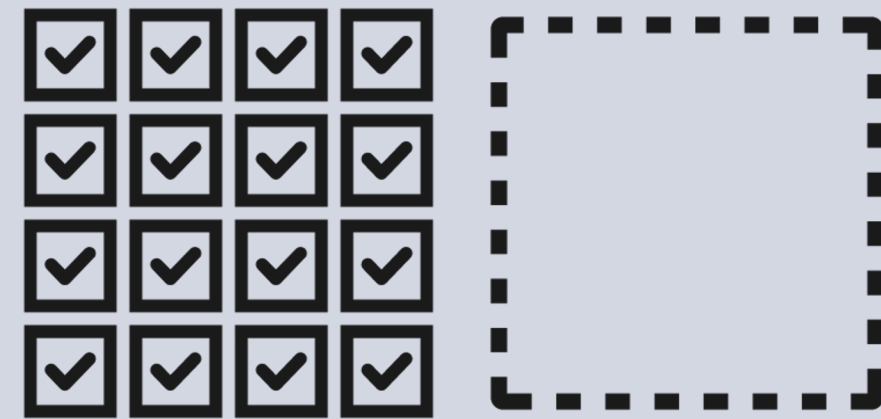
CHANGE

HOW TO HELP SELLERS AND MANAGERS TO
CHANGE THEIR BEHAVIORS

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3 COGNITIVE DISTORTIONS

AND STRATEGIES TO HELP SELLERS CHANGE THEM



ALL OR NOTHING THINKING

Must be perfect,
or give up



ASSUMPTIONS

Jumping to conclusions
with little evidence



THE 'SHOULD'S'

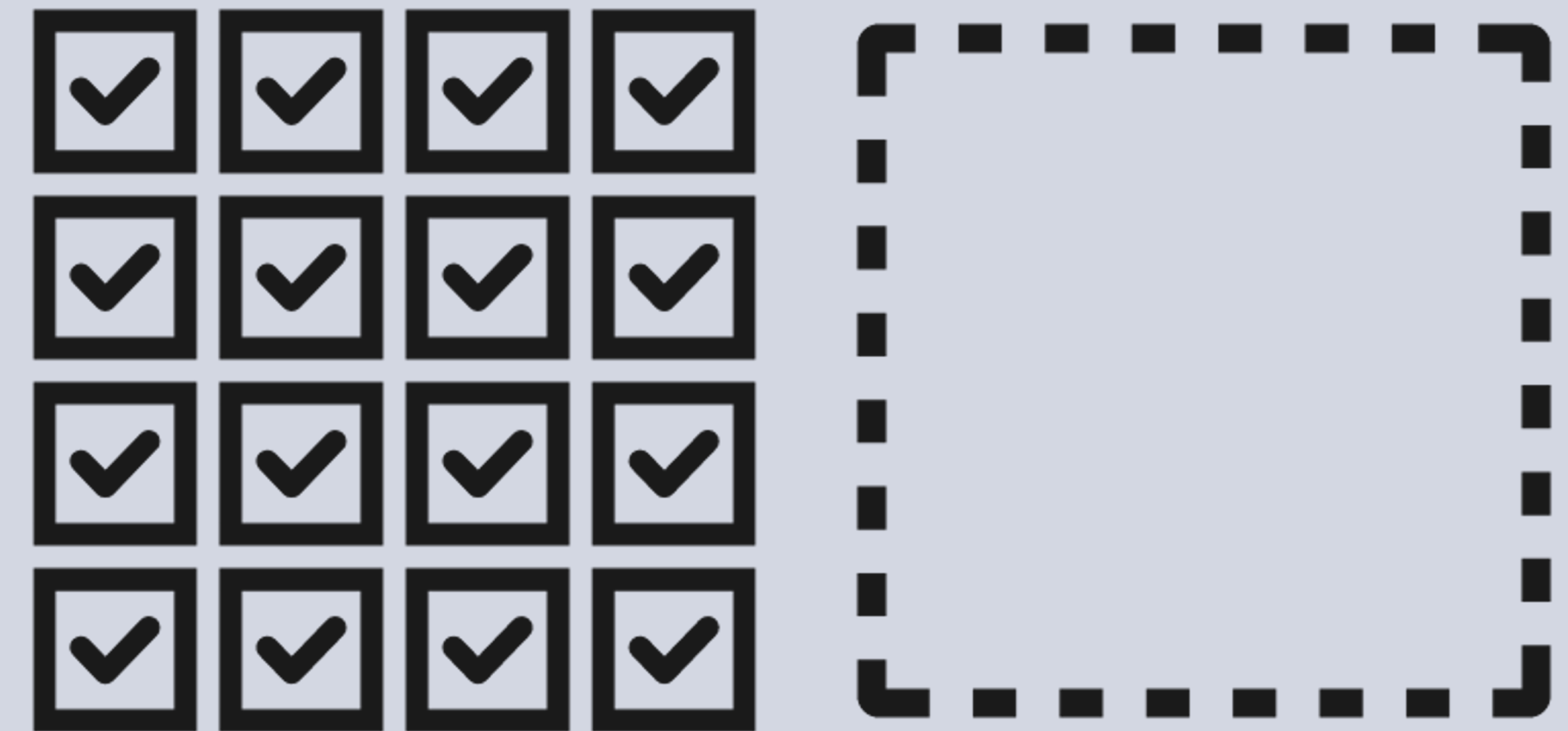
Stick to the rules, or else

1

COGNITIVE DISTORTIONS

ALL OR NOTHING

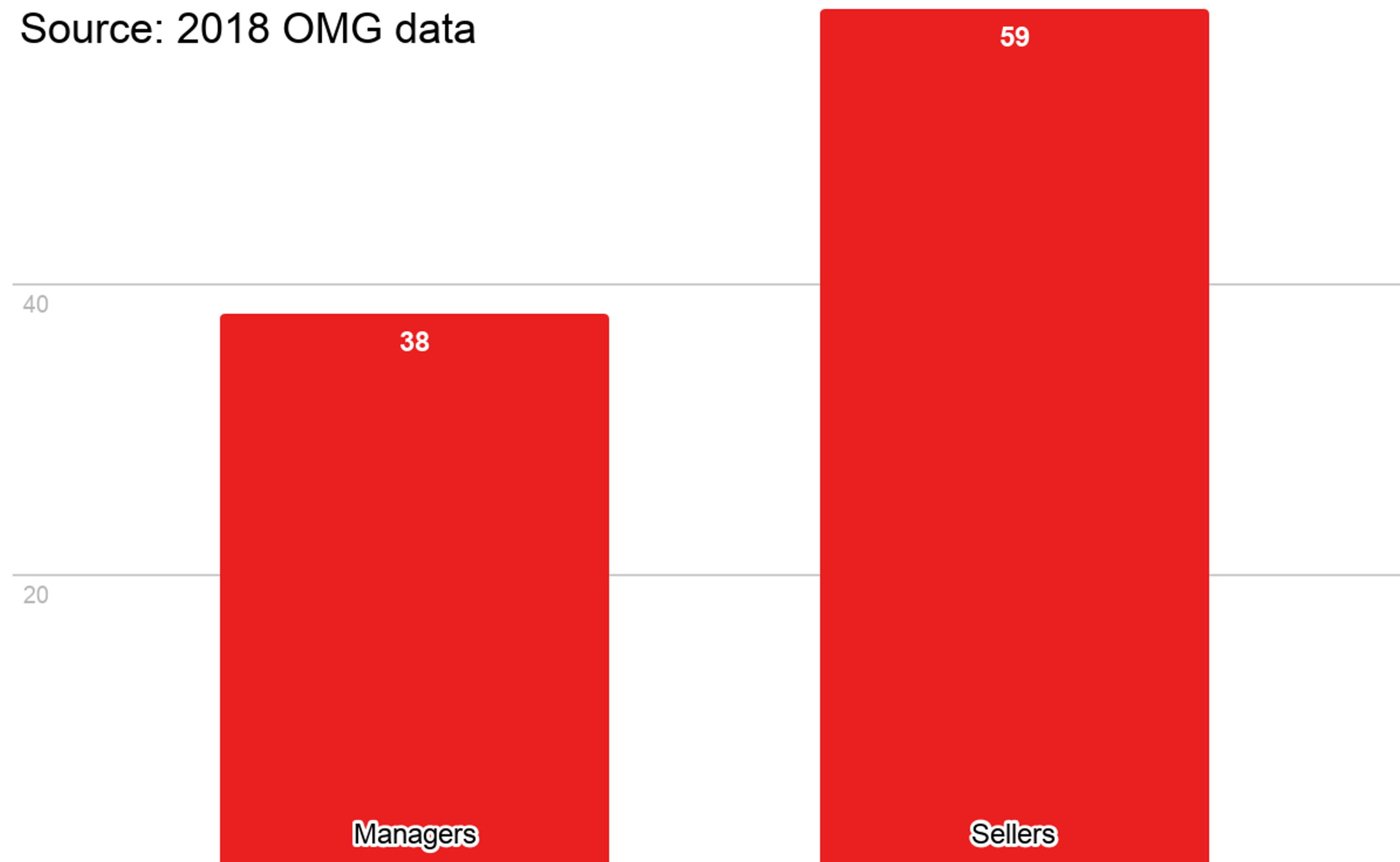
Perfectionist thinking often comes from a need for approval mindset that is prevalent in both managers and sellers.



NEED FOR APPROVAL

(ALL OR NOTHING THINKING)

Source: 2018 OMG data



MANAGER SYMPTOM & IMPACT

Avoidance of tough questions and conversations leads to a lack of respect, accountability, pipeline accuracy, and makes sellers 124% more likely to struggle with need for approval.



SELLER SYMPTOM & IMPACT

Sellers who don't ask enough tough questions and actively listen waste time on proposals and have long sales cycles.



REVENUE IMPACT

Inaccurate forecast and lower margins,



2

COGNITIVE DISTORTIONS **ASSUMPTIONS**

Managers and sellers who jump to conclusions without much evidence often struggle to keep their emotions in check during the sales process.

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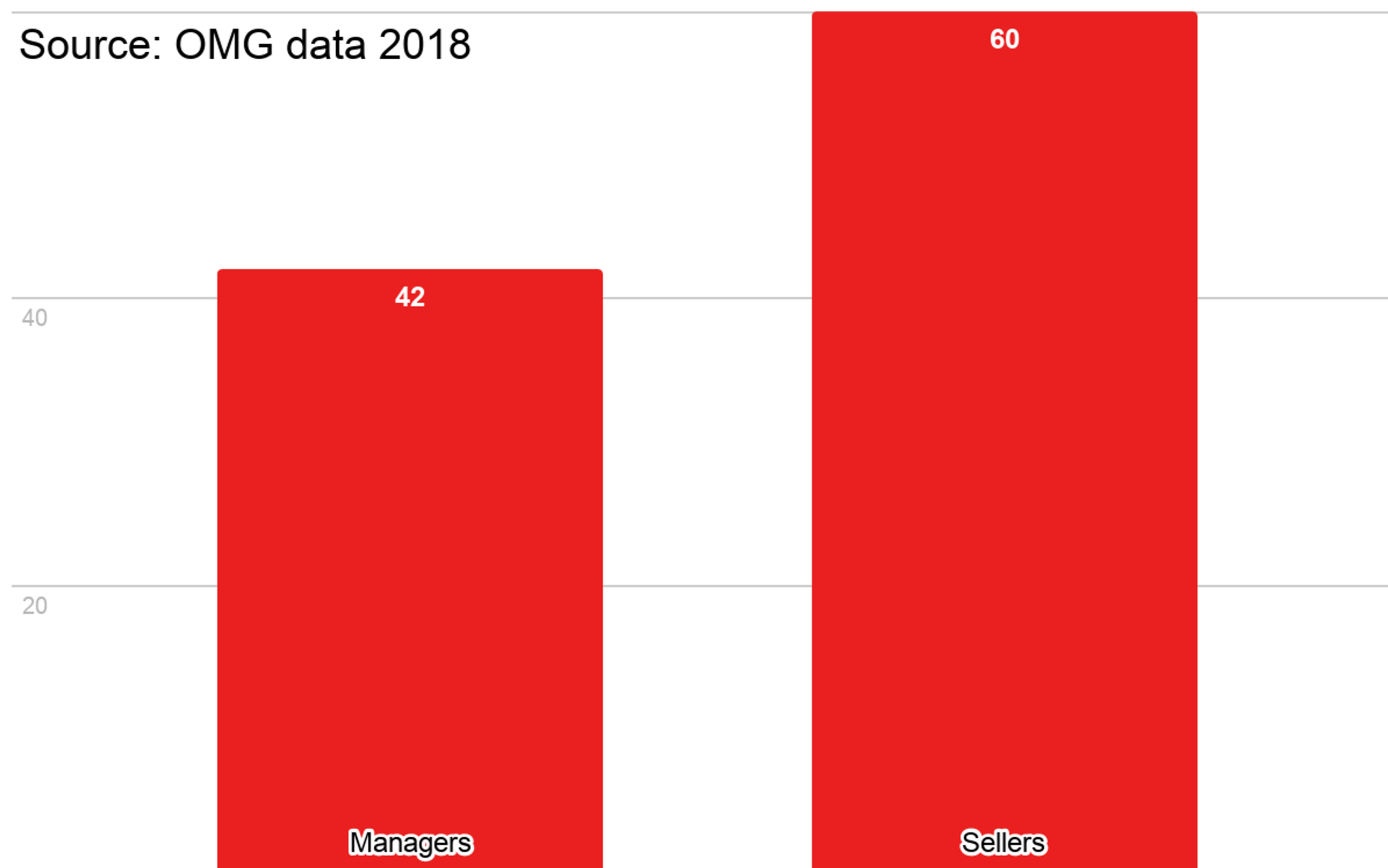


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EMOTIONAL CONTROL

ASSUMPTIONS MADE DURING SALES PROCESS

Source: OMG data 2018



MANAGER SYMPTOM & IMPACT

Without emotional control, managers will find coaching difficult and tend to rescue sellers, and makes sellers 10% more likely to struggle with emotional control.



SELLER SYMPTOM & IMPACT

Lack of listening and asking questions lead to assumptions that cause sellers to talk too much and stumble over objections.



REVENUE IMPACT

Over-inflated pipelines with unqualified opportunities

3

COGNITIVE DISTORTIONS

THE 'SHOULD'S'

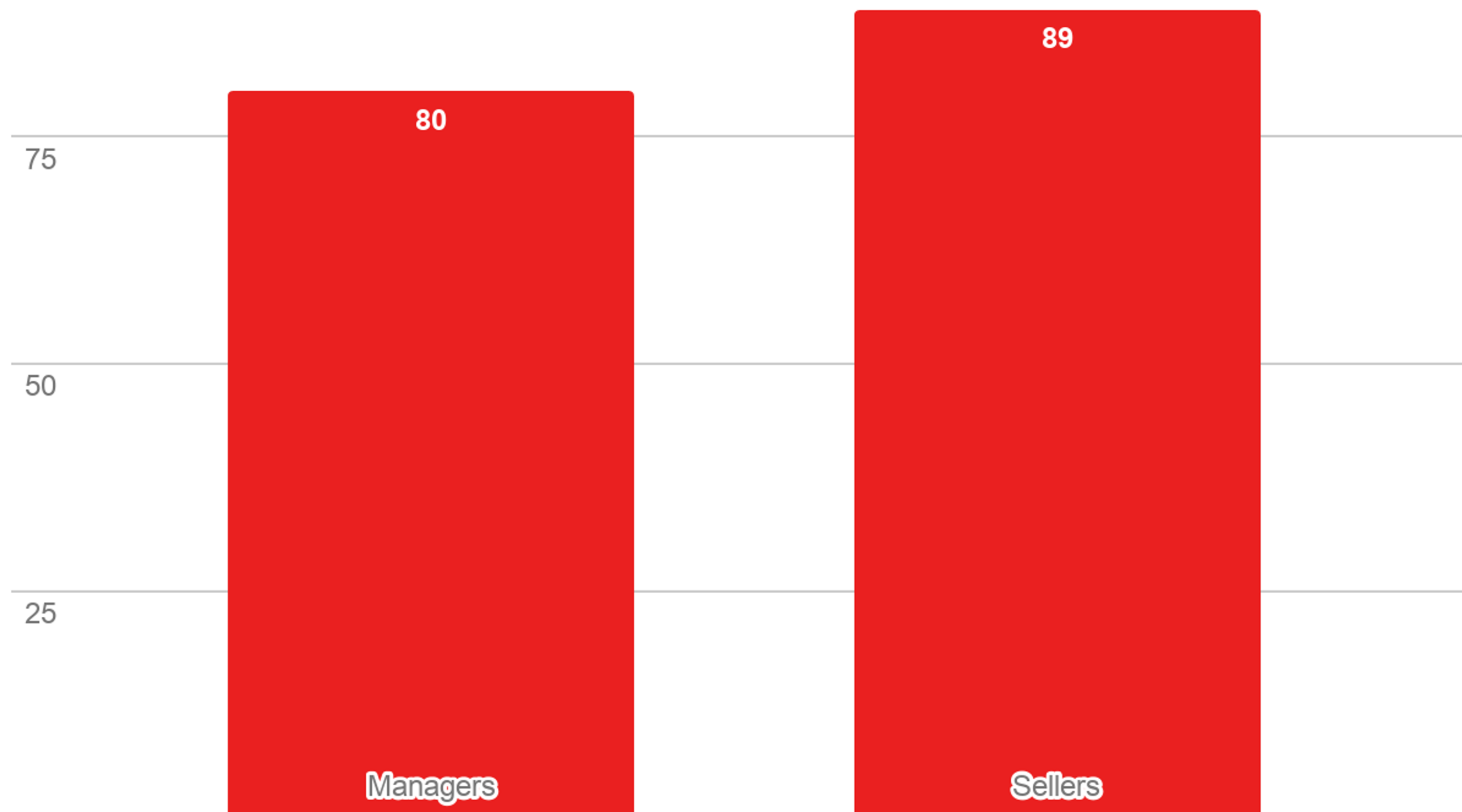
The beliefs managers and sellers have about themselves and others will either help them in executing on their knowledge and skills, or hinder them.



SUPPORTIVE BELIEFS

DO THEY HELP OR HINDER?

Source: OMG data 2018



MANAGER IMPACT

Managers without supportive beliefs are **355%** more likely to pass it along to sellers.



SELLER SYMPTOM & IMPACT

Sellers without supportive beliefs will not apply new knowledge learned in training.



REVENUE IMPACT

Wasted training dollars

3 COGNITIVE BEHAVIORAL STRATEGIES

TO CHANGE COGNITIVE DISTORTIONS



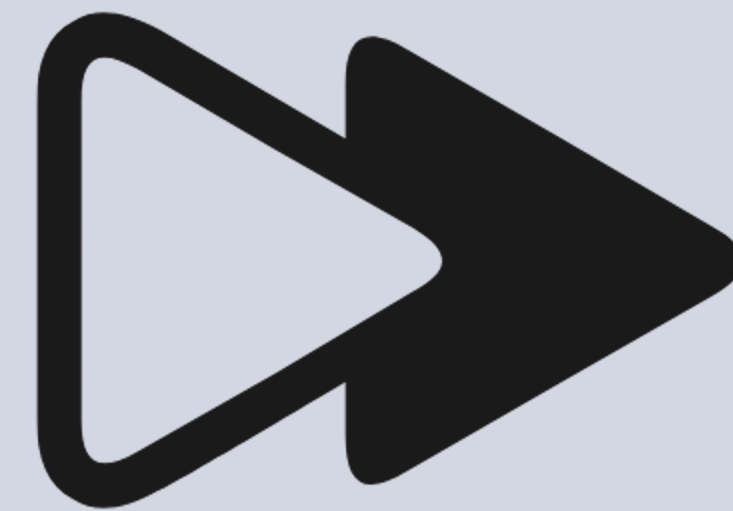
UNRAVEL

Awareness, root cause,
& challenge



EXPOSE

Small exposure to trigger
and practiced response



END PLAY

Worst case scenario

1

COGNITIVE APPROACHES UNRAVEL

Help managers and sellers become aware of the thought distortion by working backwards to uncover where it comes from, and then challenge it.



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UNRAVELING A COGNITIVE DISTORTION

DO:

- Have coachee identify the belief
- Ask where it comes from
- Ask them what impact it has
- Challenge the belief as false, or non-supportive

DON'T:

- Label them for having the belief
- Dismiss or argue their perspective
- Tell them to get over it

Examples of when to use:

- Resistance to executing a step in the process





2

COGNITIVE APPROACHES

EXPOSE

Expose the coachee to the trigger and practice the response through role-play until it is no longer a trigger.

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EXPOSING THE COACHEE TO A TRIGGER

DO:

- Have coachee identify the trigger
- Start in 1:1s without group
- Gradually increase intensity of trigger

DON'T:

- Tell them what their trigger is and how to respond
- Surprise them with it in a group role play
- Take it easy on them

Examples of when to use:

- Prospects have questions that fluster them
- Aren't able to handle objections without getting defensive
- Need to go around POC to get to decision maker

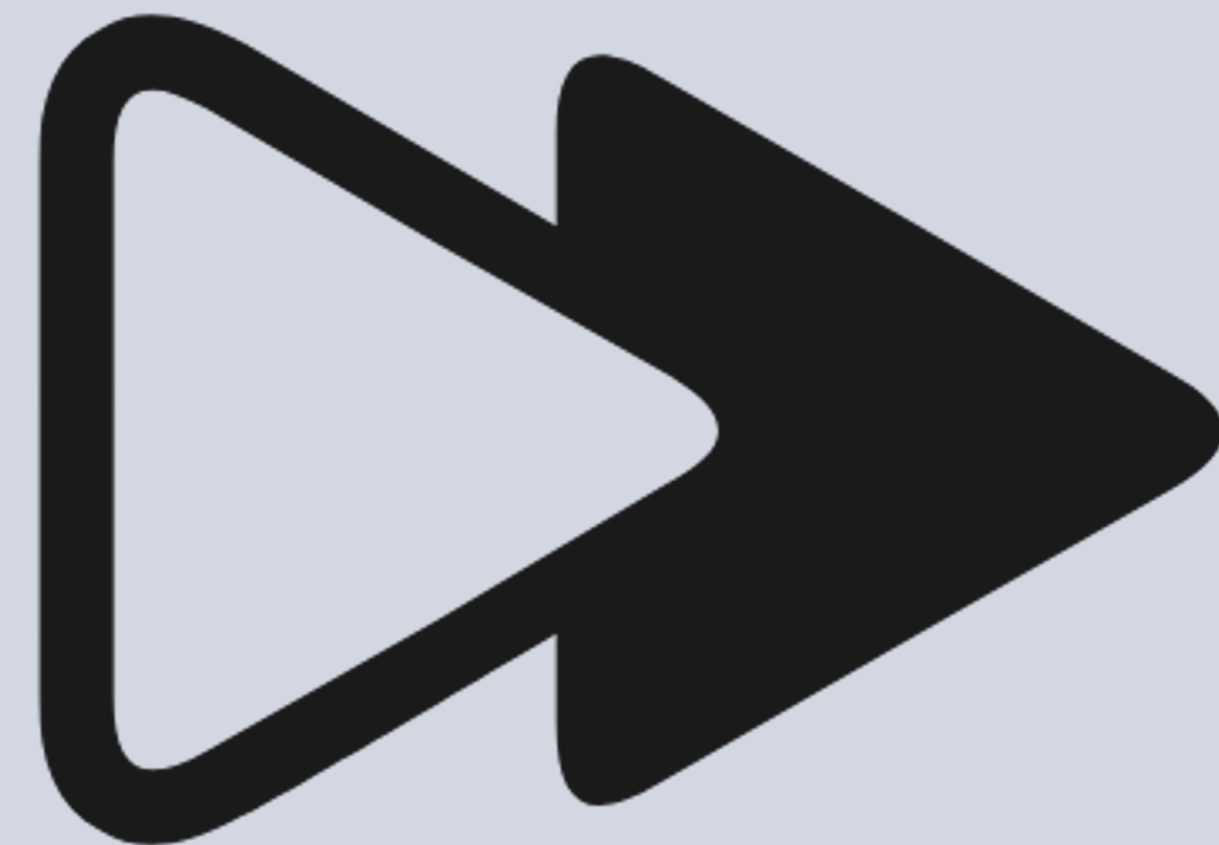


3

COGNITIVE APPROACHES

END PLAY

What is the worst case scenario? Role play the script until the end, was it the end of the world?



PLAYING IT OUT UNTIL THE END

DO:

- Ask if/then questions
- Ask worst case scenario questions
- Ask logic based questions

DON'T:

- Minimize their fear and anxiety
- Make light of fun of their fear
- Tell them to do it anyway or else

Examples of when to use:

- Resistance to getting to decision makers
- Negotiations & money discussions
- Prospecting reluctance



Thank you! Questions?

bit.ly/cognitivecoach



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