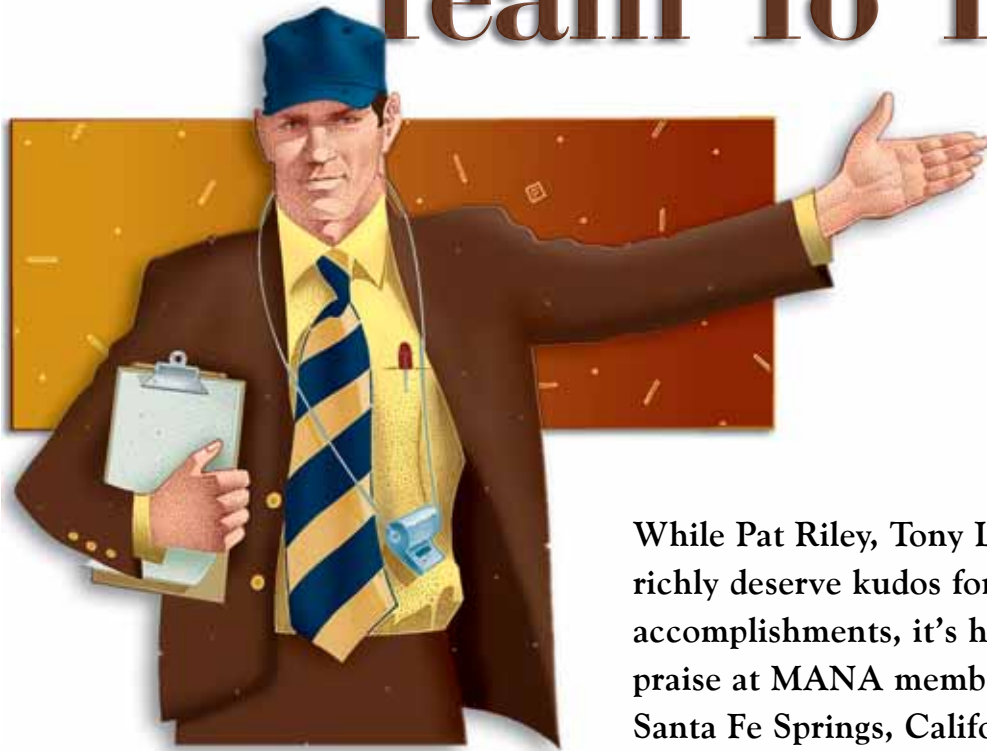

Rep Coaching Pushes Team To The Top



While Pat Riley, Tony LaRussa and Tony Dungy richly deserve kudos for their coaching accomplishments, it's high time to direct similar praise at MANA member Nelson & Associates, Santa Fe Springs, California.

If those aforementioned professional coaches have reached the heights in their respective worlds of basketball, baseball and football, so too has the rep firm honed its coaching skills and improved the performance of its professional team.

Nelson's dedication to the practice of coaching was described in two sessions of NEMRA's 37th Annual Conference in New Orleans earlier this year. The first was an educational seminar entitled *Coaching—The Missing Link Between Planning and Achieving*, that preceded the association's formal conference. The second was one of four "Best Practices" that were an integral part of the NEMRA Manufacturers Group (NMG) presentation of *Eliminating Wasteful Activities in the Representative and Manufacturer Sales &*

Marketing Channel. Both sessions were conducted by Kurt Nelson, CPMR, president of Nelson & Associates and Tara Lockie, director of corporate development for the firm.

The Importance of Time

The rationale for espousing coaching in the rep world was described by Nelson when he recalled his personal development as a rep. "I grew up in the business making calls with principals," he said. "I learned so much between calls. I asked questions of the principal and we always talked products. As a result, I and the other members of my generation made the most of our time. Things are different now. We're all

equipped with cell phones and Blackberries. There's no time left for composing ourselves for the next call or talking strategy.

"Our practice of 'coaching' is an effort to give back the time we need to improve our performance."

When Nelson realized something had to change in his organization, Lockie was able to take the ball and run with it thanks to her familiarity with consultant Tom O'Connor, The Farmington Consulting Group, Farmington, Connecticut. O'Connor was retained as a consultant and worked with Nelson. According to Lockie, "He took what was happening in our company and explained how to hone a coaching process that would complement our corporate strategy and assist us in growing new markets. The power tool that evolved was:

- A collaborative process.
- Established short- and long-term goals.
- Included active listening, asking questions, sharing views.
- A review of results.
- The development of creative solutions."

The importance of coaching was driven home to Kurt Nelson at the very beginning of the process, since he was the first to experience it. "If I wasn't busy, I sure gave that impression," he explained. "I had earned a well-deserved reputation for e-mail management. I figured that since I was working nights and weekends, e-mail would be the best way to communicate, since I could ask questions and receive answers without having to personally interact with others. While I thought the e-mails were efficient and time saving, it was pointed out to me how demotivating they could be, especially if the person I was communicating with was only four feet from my office."

Nelson began his coaching experience with Lockie serving as his coach. "We started with something that should be simple — but it wasn't something I was very good at — giving compliments to others."

According to Nelson, "Tara started the whole process by working on me to more effectively show my appreciation to people. It was very basic, with an actual 'cheat sheet' providing me with ways to say 'well done.' I'll admit it was pretty mechanical, but it all went well and got me started."

Overcoming Objections

Once over that hump and assured that she was

***"I grew up in the business making calls with principals. I learned so much between calls. I asked questions of the principal and we always talked products....
Things are different now. We're all equipped with cell phones and Blackberries. There's no time left for composing ourselves for the next call or talking strategy."***

making progress with Nelson, Lockie suggested the coaching process should be taken to the whole Nelson staff. "While everyone was in agreement that I needed help, the initial response from staff wasn't all that receptive," said Nelson. "Typically objections included 'Some people aren't going to like it,' 'We don't need it,' 'We already conduct reviews,' 'Won't this take time away from our sales calls?' and 'How are we ever going to find the time to get this done?'"

"In response to those reactions, we asked everyone, 'Would you see any benefit in having a monthly one-hour meeting with one of your principals?' The answers naturally came back 'Yes.' Then we asked if there wouldn't be similar benefits in meeting with and being coached by company associates. The result was everyone found the time and all indications show it will continue into the future."

According to Lockie, the coaching concept includes formal and informal coaching.

"The formal coaching is composed of preset, private appointments that include the use of a coaching report and standard. The informal sessions are more in-the-moment, conducted in-person by phone or e-mail." She emphasizes that it's the formal coaching sessions "where the rubber meets the road. Both the coach and the company associate spend 30 minutes preparing for these sessions. Various sales reports, calendars, etc. are reviewed. With the formal sessions, an actual document is generated where you write down tasks, due dates, topics of discussions. Successes also are noted on the report." In addition, all topics that are discussed during the sessions are noted—that includes conversations that might relate to careers, sales performance, on-going training, etc.



Kurt Nelson, CPMR, and Tara Lockie, both of Nelson & Associates, explained how the agency's coaching program was a successful effort to improve agency performance.

While the company now uses a formal “coaching report,” Lockie explained that when she first began coaching years ago, “I used a yellow pad. Use whatever works best for you.”

Completing the Journey

Lockie noted, “Coaching is a journey. There are going to be ups and downs during the course of the journey. You’ll miss some appointments, or you won’t be performing as well as you want to at various times during the journey. What’s important is to regroup and don’t give up on the process. Don’t say it doesn’t work. Realize that you’re never going to get to the point where you are 100% satisfied.”

A few of the keys she points to as being critical to the implementation of a coaching process are:

- Make sure that when the program is rolled out it is done company-wide and is accompanied with training on the process.
- Always use a written coaching report.
- Track the coaching sessions.
- Audit the coaching reports on a quarterly basis.
- Remember that coaches need coaches — if at all possible, make sure that’s done. The result is you’ll be a better coach.

Looking back over their 18-month journey through coaching, both Nelson and Lockie agreed it wasn’t as easy as they thought it might be going in. There were measurable benefits, however, according to Nelson:

- “We improved morale company-wide.
- “Attitudes and teamwork improved throughout the organization.
- “Improved communication and accountability resulted.
- “Improved accountability — coaching reports don’t lie.”

After all is said and done concerning the coaching process, has it been worth it for Nelson & Associates? Ask Kurt Nelson and he maintains the firm has seen a:

- 300% increase in opportunity tracking.
- 45% improvement in telemarketing performance.
- 40% improvement in the effectiveness of the company sales plan.
- 80% increase in on-time performance.
- The largest sales growth in the history of the company.
- And most important, there have been 360 fewer e-mails from Kurt. □

Copyright © 2007, Manufacturers’ Agents National Association
One Spectrum Pointe, Suite 150, Lake Forest, CA 92630-2283
Phone: (949) 859-4040 • Toll-free: (877) 626-2776 • Fax: (949) 855-2973
E-mail: MANA@MANAonline.org • Web site: www.MANAonline.org
All rights reserved. Reproduction without permission is strictly prohibited.