# An Exploratory Study of the Factors Related to the Sales Manager and Salesperson that Affect the Sales Coaching Process

By Carlin A. Nguyen, Jeffrey E. Anderson and Andrew B. Artis

Despite the importance of sales coaching, 93% of sales managers report that they still need more training to coach others properly. Extant sales coaching research has provided valuable insights to sales managers on effectively coaching salespeople. Unfortunately, there remains a lack of understanding of how sales manager- and salesperson-related factors influence the sales coaching process. Much of the current sales coaching literature was studied from the sales manager's or the salesperson's perspective but not both. Because most of the coaching activity occurs between a sales manager and salesperson, understanding the sales coaching process from both the sales manager's and the salesperson's perspectives is imperative to equip managers with the knowledge, skills, and abilities to properly coach. This paper addresses this gap by conducting interviews with business-to-business (B2B) sales managers and salespeople across various industries and identifies the factors related to sales managers and salespeople that affect sales coaching decisions, engagement, effectiveness, and outcomes. Overall, the results indicated that sales managers and salespeople have varying perspectives regarding sales coaching.

Academicians and researchers agree that sales coaching is one of the top skills among high-performing sales managers (Deeter-Schmelz, Goebel, and Kennedy, 2008; Ingram et al., 2005) and is the most effective method to achieve sales goals (Sales Management Association, 2014). LSA Global (2016) found that among those who were coached (versus non-coached), the average revenue per sales representative increased by 113%, and the average skill adoption rate increased by 20%. While there are positive benefits of effective coaching, the reality is that many managers are not effective coaches. Ninety-three percent of managers reported needing more training to properly coach (Globoforce, 2016). Hence, research on the sales coaching process can help managers improve their coaching skills and enhance the overall effectiveness of their coaching program.

Extant research on the sales coaching process is sparse and fragmented (Badrinarayanan et al., 2015). Much of the research has focused on the benefits and outcomes

**Carlin A. Nguyen** (Ph.D., University of South Florida), Assistant Professor of Marketing, California State University Los Angeles, Cnguy195@calstatela.edu

**Jeffrey E. Anderson** (Ph.D., Florida State University), Assistant Professor of Marketing, California State University Los Angeles, jander51@calstatela.edu

**Andrew B. Artis** (Ph.D., University of Tennessee), Associate Professor of Marketing, University of South Florida, aartis@usf.edu

of coaching, such as its impact on performance, attitudes, and behaviors (e.g., Badrinarayanan et al., 2015; Onyemah, 2009; Rich, 1998). Other researchers have investigated the conditions that enhance coaching effectiveness, such as whom to coach and when (Bolander et al., 2020). While these studies provide sales managers with practical insights on how to properly coach, these studies examined the sales coaching process from either the perspective of the sales manager or the salesperson but not both. In their review of the sales coaching research, Badrinarayanan et al. (2015, p. 1088) conclude that "very little is known on how the sales coaching process is influenced by salesperson, sales manager, sales coach, and organization-related factors." Because most of the coaching activity occurs between a sales manager and salesperson (Nguyen et al., 2019; Richardson, 2016), understanding the sales coaching process from both the sales managers' and salespeople's perspective is imperative to equip managers with the knowledge, skills, and abilities to coach. The lack of both perspectives can lead to ineffective coaching. For instance, a recent survey by Edinger (2015) found that sales managers tend to overestimate their coaching effectiveness compared to ratings provided by their subordinates. In the survey, sales managers rated their coaching abilities in the 79th percentile, but their subordinates ranked them in the 38th percentile. Consequently, sales managers are not coaching salespeople how they want to be coached.

This paper aims to address this gap in the literature by exploring the sales coaching process from both the perspectives of sales managers and salespeople. We conducted interviews with business-to-business (B2B) sales managers and salespeople across various industries using a discovery-oriented approach. We identified the factors related to sales managers and salespeople that affect sales coaching decisions, engagement, effectiveness, and outcomes. Overall, the results indicated that sales managers and salespeople have varying perspectives regarding sales coaching. Specifically, the results of the interview showed various skills (adaptive coaching), behaviors (role-modeling, empathy/caring), and abilities (selling ability/knowledge) related to the manager that impacts how they coach and their coaching effectiveness. In addition, we also found different behaviors (coachability), preferences (communication style), and situations (current performance/experience/ knowledge) related to the salesperson that impacts how they respond to their coach. Finally, the results showed several benefits of coaching (learning, problem-solving, goal clarity/obtainment, motivation) that indirectly impact the salesperson's performance.

In the following sections, we review the literature on sales coaching and managerial coaching, followed by a discussion of the results of our interview and their implications for academicians and practitioners.

# LITERATURE REVIEW

#### **Sales Coaching**

Coaching can be described as a "process of equipping people with the tools, knowledge, and opportunities they need to develop themselves and become more effective" (Peterson and Johnson Hicks, 1996, p. 14). Some researchers believe that coaching is a way to facilitate learning (Beattie, 2006; Ellinger and Bostrom, 1999; Ellinger, Beattie, and Hamlin, 2010). Generally, definitions of coaching in other domains mention facilitation or helping others through an issue (Hamlin, Ellinger, and Beattie, 2008) and a trust-based relationship (Gregory and Levy, 2010; Peterson and Hicks, 1996).

Indeed, in a literature review of popular press (non-academic) articles, Rich (1998) found that sales

professionals typically discussed sales coaching as a multidimensional activity comprising three constructs: feedback, role modeling, and trust. Likewise, Corcoran et al. (1995, p. 188) defined sales coaching as the "sequence of conversations and activities that provide ongoing feedback and encouragement to a salesperson or sales team member to improve that person's performance." To distinguish sales coaching from other forms of coaching (e.g., executive coaching, athletic coaching, etc.), Badrinarayanan et al. (2015, p. 1092) described coaching as "an action-oriented process of equipping salespeople, sales managers, and senior sales executives with appropriate KSA [knowledge, skills, and abilities] that will contribute toward cognitive, emotional and behavioral development and enable them to achieve sales task-related and organizationrelated goals and objectives in an effective manner." In this paper, we adopt the definition offered by Badrinarayanan et al. (2015), with the exception that our examination focuses on the sales coaching interaction between the sales manager (as coach) and the salesperson (as coachee), as most sales coaching occurs between these two constituents (Nguyen et al., 2019; Richardson, 2016).

There are many benefits of sales coaching to firms and individuals. For example, sales coaching has influenced motivation, role ambiguity, satisfaction, and job performance (Deeter-Schmelz, Goebel, and Kennedy, 2008; Onyemah, 2009). Other researchers have suggested that sales coaching may promote ethical behavior, resistance to change, and customer orientation (Badrinarayanan et al., 2015; Chonko, Roberts, and Jones, 2006; Honeycutt et al., 2001; Jaramillo et al., 2006). Coaching may also help salespeople develop active, empathetic listening skills, enhancing buyerseller interactions (Comer and Drollinger, 1999). In addition, sales managers can use coaching techniques to help their salespeople cope with sales call anxiety (Kemp et al., 2013; Verbeke and Bagozzi, 2000), thereby influencing the attributions and behavioral intentions of inexperienced salespeople who are more prone to failing more frequently in the early part of their career (Badovick et al., 1992; Dixon et al., 2003). Furthermore, coaching is more effective depending on whether a new salesperson has received a formal sales degree or previous experience (Bolander et al., 2020).

While the current research on sales coaching is limited, it provides an incomplete picture of the sales coaching process and how factors related to the sales manager and salesperson affect it (Badrinarayanan et al., 2015). As a result, Badrinarayanan et al. (2015) have called for more research on how the sales coaching process is affected by factors related to the sales manager/coach and the salesperson.

Before we can adequately address this gap in the sales literature, a closer examination of the coaching studies from other domains (management, sports, education, etc.) is necessary. However, we will primarily focus on the managerial coaching domain because of the similarities between managerial coaching and sales coaching (i.e., manager coaching a subordinate).

## **Managerial Coaching**

Research on the managerial coaching process has focused on the factors that motivate managers to coach (Beattie et al., 2014). Researchers and practitioners have cited that the reasons that managers do not devote more attention to coaching are due to the firm's culture, managerial norms, and manager's internal beliefs (Badrinarayanan et al., 2015; Evered and Selman, 1989; Orth et al., 1987; Sales Management Association, 2014). For example, Heslin, Vandewalle, and Latham (2006) demonstrated that managers who believed personal attributes are malleable and can be improved upon were more likely to engage in coaching activities than those who thought that personal characteristics are fixed and static. Orth et al. (1987) posited that the lack of managerial coaching might be due to: (1) the absence of a reward that would incentivize the manager to engage in coaching activities with their employees, (2) the lack of a corporate culture of coaching, and (3) insufficient training provided by the firm to develop appropriate coaching skills, knowledge, and abilities. Similarly, Evered and Selman (1989) asserted that the lack of managerial coaching might be attributed internally. For example, managers may not coach to avoid revealing their weaknesses to their employees, or managers do not want to be directly responsible for the salesperson's poor performance. Beattie (2006) found that coaching was more prominent within companies that supported and promoted learning at the firm level. Managers were especially more motivated to coach if they had to (job requirement) or desired to help others (Beattie, 2006). In addition, Pousa and Mathieu (2010) found that managers engaged in more coaching (versus commanding) when firms focused more on long-term (versus short-term) results.

The extant research has helped academicians and practitioners understand the motivating factors that influence managers to engage in coaching (i.e., factors that influence coaching behaviors). However, there is no research, to our knowledge, that identifies whether and to what extent specific skills, backgrounds, attributes, dispositions, and experiences of a coach influence coaching decisions and behaviors of sales managers (Badrinarayanan et al., 2015; Feldman and Lankau, 2005). Thus, it is necessary to examine the sales managers' characteristics and their impact on the sales coaching process.

In addition, much of the coaching research has focused on the sales manager. Nevertheless, empirical research on the individual characteristics of the salesperson and the impact on the coaching process is limited. Sales researchers recognize that coaching practices need to be tailored to the individual based on the salesperson's characteristics (e.g., age, gender, career stage, and readiness for change) (Chonko, Roberts, and Jones, 2006; Onyemah, 2009). Onyemah (2009), for example, found that coaching efforts should be devoted more to salespeople who are younger, less confident, less educated, and who do not share the same values as the firm. Sales managers have stated that coaching approaches and behaviors change depending on the individual being coached (Badrinarayanan et al., 2015). Shannahan, Bush, and Shannahan (2013, p. 41) showed that salespeople vary in their coachability, which is "the degree to which salespeople are open to seeking, receiving, and using external resources to increase their sales performance in a personal selling context." Less coachable salespeople are not as receptive to management practices. Therefore, it is vital to identify salespeople's characteristics and traits that influence how they respond to coaching behaviors from a coaching perspective.

#### **METHODOLOGY**

Similar to other sales researchers (e.g., Badrinarayanan et al., 2015; Ferrell et al., 2010; Richards and Jones, 2009), we employed a discovery-oriented method (Eisenhardt, 1989) by conducting semi-structured interviews with sales managers and salespeople to explore the factors that affect the sales coaching process. We focused on the following topics and then probed with additional questions when appropriate:

- 1. What factors related to the sales manager (as sales coach) affect their decisions and behaviors?
- 2. What factors related to the salesperson affect their attitudes and response to coaching?
- 3. What are the outcomes of sales coaching, and how do they impact sales performance?

#### **Sample and Data Collection**

We interviewed sales managers who engage in coaching activities and salespeople who receive coaching from their managers. Specifically, we chose informants who had at least one year of coaching experience (given or received). Our sample consisted of managers who had between one and 12 years of coaching experience and salespeople coached by a manager between six months and 19 years. In addition, each manager coached other salespeople, and each salesperson received coaching at least once a month.

The number of participants depended on *theoretical* saturation, i.e., no new information emerges from the data (Glaser and Strauss, 1967; O'Reilly, Paper, and Marx, 2012). As a result, we interviewed twenty-five informants (12 sales managers and 13 salespeople) for this study. Subjects were recruited from various sales organizations that will represent different industries.

**Table 1: Summary Descriptive of Respondents** 

Respondent	Position	Years of Sales	Industry	Gender
	M	Experience		M. 1
AJ	Manager	10	Media	Male
Aaron	Salesperson	12	Media	Male
Brad	Salesperson	1	Telecommunications	Male
Chad	Salesperson	3	Media	Male
Christina	Salesperson	1	Insurance	Female
Daniel	Salesperson	2	Insurance	Male
Dave E.	Manager	14	B2B Products/Services	Male
Dave F.	Salesperson	12	Automotive	Male
Elliahu	Salesperson	1	Industrial	Male
Eric	Manager	13	Media	Male
Evan	Salesperson	4	Packaging	Male
Frank	Salesperson	19	Media	Male
Glenn	Manager	30	Insurance	Male
Gwen	Salesperson	12	Media	Female
Hunter	Salesperson	2	Industrial	Male
Jay	Manager	8	Insurance	Male
Jennifer	Manager	10	Automotive	Female
Jenny	Manager	15	Media	Female
Joe	Manager	12	Insurance	Male
Mya	Salesperson	4	Media	Female
Rachel	Salesperson	3	Media	Female
Raul	Manager	10	B2B Products/Services	Male
Ricardo	Salesperson	2	Beverage	Male
Tanya	Manager	15	Industrial	Female
Tory	Manager	8	Insurance	Male

Due to limited resources, informants were identified through convenience sampling of five corporate partner firms representing various industries such as media, insurance, beverage, telecommunications, and B2B products/services.

Descriptive information of each participant (manager and salesperson) is presented in Table 1. To protect the privacy of each respondent and company, we identify respondents by their first name, position, and industry.

Each interview ranged from 45 minutes to 90 minutes in length. The interviews were conducted either in person at a location convenient to the respondent or over the phone. Before each interview, informants were given an interview consent form that explained the details of the interview, including its purpose, confidentiality, and protection of their responses.

#### **Results of the Interviews**

Below we explain the various managerial- and salespeople-related factors that impact the sales coaching process as characterized and described by each respondent group (sales manager and salesperson) using their language and terminologies. A summary of the results is located in Table 2.

#### **Factors Related to the Manager that Affect Coaching**

#### Role-Modeling

Both respondent groups indicated the importance of role-modeling behaviors in which the sales manager coaches the salesperson through role-playing or "in-the-field" activities. Role-playing served as an excellent way for sales coaches to practice new or previously experienced selling scenarios with salespeople. Role-playing seemed more helpful to new or inexperienced salespeople than for veteran representatives.

- "[The role-play] helps me feel more comfortable practicing with my manager before I actually sell in front of a customer (Christina)."
- "[My manager] would ask me how he could help me ... I would tell him situations that stumped me with a customer, and he would role play with me and see how I would do (Daniel)."

Table 2: Perception of Sales Coaching Process and Its Effectiveness

	Manager's perspective	Salesperson's perspective
Decision to coach	Managers are more likely to coach those who are coachable, and they believe that they cannot influence whether a salesperson is coachable.	Coachability  • Salespeople are more open to coaching (i.e., more coachable) if the manager's coaching efforts are perceived to benefit salespeople's goals (rather than the manager's) and needs.
	Current performance and experience  • Managers tend to coach those who they perceive can improve the most. As a result, top performers and veteran salespeople often received the least amount of coaching.	Current performance and experience  • All salespeople believe that they can benefit from coaching.  However, depending on their level of performance and experience, salespeople view their sales manager's role as a coach (i.e., how the coach can help) changes.

(Table 2 continued on next page)

**Table 2: Perception of Sales Coaching Process and Its Effectiveness (Continued)** 

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Casabing angagament	Manager's perspective	Salesperson's perspective			
Coaching engagement and effectiveness	Role playing  • Often conducted in the office where sales managers conduct simulated selling situations with salespeople to help them prepare for a sales call or help them develop their selling knowledge, skills, and abilities.	Ride-along  • Salespeople believe role-playing is an effective coaching tool.  Still, a ride-along is preferred where sales managers can role-model selling behaviors during sales calls or discuss opportunities for improvement immediately after a call.			
	Adaptive coaching  • Managers try to get to know each salesperson so that they can adapt their coaching style to the salesperson	Adaptive coaching  • Salespeople like it when their managers get to know them and adapt their coaching style to the salesperson.			
	Managers show salespeople that they care about them in various ways to build reports and gather more information to help them coach more effectively.	Caring  • Salespeople who perceive their sales manager as more receptive to coaching feedback and behavioral changes.			
	Sales knowledge  Managers continue to learn new things from either outside resources or their salespeople. They use this knowledge to help salespeople overcome challenges or improve their knowledge, skills, and abilities.	Sales knowledge  Salespeople value a sales manager's knowledge over their years of experience or performance record as long as that knowledge helps them advance through the sales process or close a sale.			
	Managers understand that each salesperson is different, and the most influential coaches are those who adapt to each salesperson's communication styles and preferences.	Salespeople expect managers to adapt to them rather than each salesperson adapting to their managers. Consequently, salespeople are less engaged with coaching when managers fail to adapt.			

Table 2: Perception of Sales Coaching Process and Its Effectiveness (Continued)

	Manager's perspective	Salesperson's perspective	
Outcomes of coaching	Coaching is successful     whenever new knowledge,     skills, and abilities are obtained.	Salespeople want to learn anything that can make them better and more effective.	
	Problem-solving  • Managers tend to help their salespeople "think" through problems by asking them questions to let them figure it out themselves.  Goal clarity/obtainment	Problem-solving  • Salespeople prefer to either collaborate with a sales manager to solve a problem or to have the sales manager tell/show them the solution.	
	Managers help salespeople set and reach their goals through formal coaching sessions.	Goal clarity/obtainment  • Salespeople are satisfied with a coaching session when they leave with a clearer understanding of what hindered them from reaching their goals and how they can improve moving forward.	

However, some salespeople expressed that role-playing in the office can be unrealistic and that it was more effective to have a sales coach in the field, such as for "ride-along." Ride-alongs are more effective and conducive to coaching for several reasons. First, it allows the sales manager to observe the salesperson inaction and provide immediate feedback versus having the salesperson talk about the sales call post-hoc (e.g., during role-play sessions). Thus, it allows the manager to provide better feedback and the salesperson to pivot at the moment. Second, it provides an opportunity for the sales manager and the salesperson to learn more about each other personally. Several sales respondents indicated they were more comfortable sharing personal information during these private moments outside (versus inside) the office. This opportunity enhances the relationship between the sales coach and the salesperson and allows the sales coach to better adapt to the salesperson based on their idiosyncrasies. It also provides the coach with a deeper understanding of the mechanisms that affect the salesperson's performance. Third, it enhances salespeople's attitudes toward the coach and increases sales coachability (i.e., salesperson's openness to coaching) when the sales coach is involved in the selling process (e.g., developing

new business, needs analysis or discovery, negotiating with a client, etc.) with the salesperson.

- "It's like having a coach run with you when
  I was playing football ... just having [my
  manager] be in the field with us was refreshing
  and motivating. You almost want to work harder
  and make him proud (Ricardo)."
- "I like having my manager ride along with me ... I prefer him to watch me interact with the customer and jump in when I am in trouble, and then I can see how he does something that I couldn't do, and this way, I can learn from it by seeing him do it. When we get back in the car, we usually talk about what I did well and what I could improve on (Eliiahu)."

#### Adaptive Coaching

Respondents emphasized the importance of adapting coaching behaviors to the individual salesperson during coaching encounters, such as the salesperson's style of communication and management style preferences. Adaptive coaching is similar to adaptive selling, defined as altering sales behaviors based on the salesperson's

interpretation of the sales interaction with the customer and selling situation (Spiro and Weitz, 1990). Sales coaches reported that adapting to the salesperson made the salesperson much "easier to work with" and more "open" and "responsive" to coaching. Therefore, the more adaptive the sales coach, the more coachable the salesperson becomes.

- "Everyone is different. I have a salesperson that wants to just get down to business when we get together. If there is something wrong or if there is something that he could do better, he wants me to just tell him directly rather than beating around the bush... I have another guy that is a little more sensitive. I have to feel him out first when we sit down. See how he is doing, what's going on with his life, talk about family ... then I can start going into discussing some of the issues with his performance (Jennifer)."
- "Some people want a more hands-on type of manager, so I usually try to coach them by working more closely with them, talking to them more frequently, and spending more time with them. Other people want a more hands-off approach. So, we will usually meet formally in my office once every other week or month ... if they want to see me to help them then I make myself available (Dave F.)."
- "The more I get to know [the salesperson], the better I am able to coach that person ... I can usually push someone harder or challenge them more just enough that he doesn't get mad at me if I know the person better. Some people like to do things a certain way, and I will try to adjust however I can (Aaron)."
- "I feel like my manager really knows me as a person ... she knows how to coach me ... depending on what's going on with me in my life and how I like to talk and make decisions ... I think she does a really good job as a coach (Mya)."
- "I don't like to be micromanaged ... don't need to be talked to every day... with [another salesperson] I know he would call them every

- day and see what they are doing and how he can help (Hunter)."
- "She knows me as a person and takes into account the things that are going on in my life when she coaches me ... for example, if I am having a problem with my child, like he has been sick or something, then [my manager] knows not to question me too much and she understands that my performance this week is not representative of how I am as a salesperson (Kourtney)."

# **Caring**

Sales coaches reported the importance of showing salespeople that the coach "cares" about the individual salesperson. Caring is accomplished in various ways, including listening actively and empathetically, devoting time and attention to the salesperson, learning more about the salesperson on a personal (vs. professional) level, and selflessly serving the salesperson's needs. Salespeople remarked that if they felt that the sales coach genuinely cared about them, the salesperson would be more likely to consider the coaching feedback, share their thoughts and feelings, and evaluate the coach favorably.

- "I think a good coach is someone who really cares about the salesperson. I feel like my manager really takes the time to help me whenever I need her help. She will always respond to my texts, and I can always call her when I need to get a hold of her right away to help me answer a question, deal with a problem, or whatever (Rachel)."
- "My manager is always there for me when I need her help. I can tell that she wants to help and cares about my success (Kourtney)."
- "What makes her a good coach is that she listens to me ... cares about me ... makes time for me (Mya)."
- "If I feel like [the manager] is just making me do something because it helps him or because his boss is telling him to do it, then I just don't like it. When that happens, I just listen because I have to, but I usually don't want to make any changes,

- especially if it is not going to help me close the sale or help me with my customer (Evan)."
- "[Salespeople] need to know that you are there for them. You have to develop a relationship with them ... show them that you care and want to see them succeed. If they succeed, then I feel like I have accomplished my goal as a coach ... I don't think about the bonuses (Troy)."

#### Sales Knowledge

Sales knowledge appears to facilitate coaching in various ways. First, sales knowledge allows coaches to assess better, advise, and provide feedback during coaching sessions. Sometimes, it is more effective to ask salespeople questions to come to a solution independently. Effective questioning appears to help salespeople feel more confident about and accept the solution. Second, it allows sales managers to problemsolve better when salespeople face problems with their clients. Some salespeople use their manager as a resource and seek the answers to issues that they might be facing, whereas others work with their managers to solve a particular problem. Finally, sales coaches seem more effective the more collaborative they are with salespeople. Collaboration leads to new ideas, insights, solutions, engagement, and empowerment.

- "I am constantly reading new things about selling, and if I find something that is useful, then I will share that with my team ... there is always something new for them to learn (Tanya)."
- "I can give better feedback to someone because I have learned a lot from my own sales experience and from listening to my best AEs [account executives] ... so, I have multiple views that help me see a situation or problem differently ... (Aaron)."

Interestingly, salespeople's evaluation of the "quality" and "effectiveness" of a sales coach was not influenced by the coach's number of years of sales experience or performance as a salesperson (i.e., whether the manager was a top-performing salesperson).

- "I was not the top 10 percent of the sales team when I was a salesperson, but I was also not the bottom 10 percent. I think you have to be good at selling but not necessarily the best. A good coach will know how to deal with people, set goals, give feedback, break things down, and educate ... someone who is good at sales does not translate to a really good manager (A.J.)."
- "I am the top rep in my unit and one of the top in my district ... I don't think my manager can teach me how to sell any better ... He is just a resource ... If I have a question that I need his opinion or help to answer, then I reach out to him ... he doesn't really teach me how to sell (Brad)."
- "It's nice to know that my manager was a top salesperson ... it shows that he knows what he is doing. As long as he can help me improve my selling, then I think he is effective (Chad)."
- "If what my manager recommends works and I see that it is helping me sell and be better, then I trust him and his advice (Elliahu)."

# Factors Related to the Salesperson that Affect Coaching

# Coachability

According to Shanahan, Bush, and Shanahan (2013), sales coachability is defined as "the degree to which salespeople are open to seeking, receiving, and using external resources to increase their sales performance in a personal selling context (p. 41)." Based on the results, sales managers are less likely to engage in coaching if they believe that the salesperson is not coachable or very resistant to coaching. When sales managers were asked what they believed impacted a salesperson's coachability, the sales managers provided reasons attributed to the salesperson. In other words, no sales manager felt that they influenced a salesperson's coachability. However, when salespeople asked what made them resistant to a coach, the answers were attributed to both themselves and the manager. In particular, salespeople seemed more receptive to coaching when the reason or purpose of coaching was selfless (vs. self-serving) and when the benefits of coaching were tied to the salesperson's needs.

- "If [the manager] tells us why he is telling us to do something and how it helps us and we can see how it is going to help our performance or our customers, then I would be more open to it (Daniel)."
- "Sometimes people just don't want to be coached ... they don't have the motivation to be coached (Frank)."
- "I am more open to coaching if I feel like my manager really wants to help me and be there for me (Kourtney)."

# Communication Style Preference

Respondents indicated that each person (sales manager or salesperson) prefers how to handle various situations and how to communicate and socialize with others. The results show that coaching is more effective when the sales manager adapts to the salesperson's communication style and when the salesperson accepts and understands the sales manager's communication style.

- "... He doesn't coach me like he is a superior ... he treats me like a peer, and that affects the dynamic a lot (Hunter)."
- "I like to just have my manager tell me like it is, but I know other people like to have rapport first, so [the manager] would ask them about their family, see how they are doing, how their day is before they go into talking about issues with their performance and how to fix them (Gwen)."
- "I have a sales rep who wants to be involved in everything. He wants to talk through things with me and doesn't like it when I talk at him. He is very process-oriented and wants to lay out exactly how he thinks from A to Z. I listen and ask questions. Then, I ask him, 'well, have you thought about this and how this might affect that?' and get him to really see a different perspective. He is more receptive if I do that than if I just told him that his way is problematic and that he should do what I am suggesting to fix it (Jennifer)."

• "[My manager] is just that way ... it doesn't really bother me, but I see how it is an issue with other people ... like, it's not the way that I would personally handle the situation, but you just have to accept him for the way he is. I think that he really does care and want to help us, but the way that he comes across could be thought of as mean (Mya)."

## Current Performance and Experience

The results showed that the salesperson's level of performance (i.e., low- vs. high-performer) and experience (i.e., new vs. veteran salesperson) influenced the frequency and duration of coaching given and received. It seemed that managers spent more time with low-performers and new agents. Interestingly, veteran salespeople who were high-performers wanted to be coached by their manager, but the role that they required from the coach was different (coaching to improve performance vs. to solve complex problems). Managers seemed to be more reactive (vs. proactive) towards coaching by seeking to coach others to help them "sell" or perform better.

- "I don't have enough time to coach everyone every day. I am responsible for managing, planning, strategizing, training ... I choose [who to coach more] based on who is going to give me the most ROI with my time (Eric)."
- "I had more attention from my manager when in the beginning, but now he just checks on me once in a while to see if I need him for anything (Evan)."
- "I don't really need [my manager] to coach me on how to sell ... I come to him whenever I can't figure something out, and I need help solving a problem or just talk about the issue that I am having with my customer (Brad)."
- "[My manager] spends more time with the new salespeople but it would be nice if he spends some more time with me .... to see what I can do to grow my [book of business] ... it's not fair that he is giving most of the accounts he gets to them when here he has the number one guy on the team who has been loyal ... I mean, it's

great that he leaves me alone and lets me do my thing, but it would be nice still if he gives me the same attention and feeds me accounts once and a while too, but it just doesn't happen (Frank)."

#### **Outcomes of Sales Coaching**

Beyond the noticeable impact and benefit of sales coaching on salesperson's performance, effective coaching sessions were described by respondents as those that not only helped them close more business but also helped salespeople learn new skills, knowledge, and abilities, solve problems, set and achieve goals, and be more motivated and inspired.

#### Learning

The results indicated that effective coaching sessions taught salespeople new knowledge, skills, and abilities (KSAs) that can directly or indirectly help them in their roles. In addition, it appeared that learning new KSAs was more prominent among less experienced representatives than it was among veteran salespeople. This result for less-experienced reps might reflect that sales coaches spent more time and sessions with newer/ novice salespeople than veterans.

- "If I can learn something new that could help me be a better salesperson, then that, to me, is a good coaching session (Rachel)."
- "... [I] want to learn how [my manager] would sell in certain situations ... it's a productive meeting if I can learn something that I didn't know before (Christina)."

## **Problem-Solving**

The results showed that effective coaching sessions also helped salespeople solve the problem(s) that they might be experiencing with a case or customer. Coaches also remarked that their job was to "help them think" through their problems. Some salespeople preferred to collaborate with their managers to solve a problem, while others wanted to look towards their managers to give them the solutions to their problems. If the problem was solved, or if a solution was provided that could directly or indirectly help them solve a problem, respondents indicated that it was an effective coaching session.

- "[My manager] is good because he can help me see something differently ... and help me figure out figure out what I did wrong and how I can improve (Ricardo)."
- "[My manager] works with me on issues that
   I might be having ... like when I can't close
   on a client who keeps stalling ... when I had
   objections and didn't know how to answer them
   ... I usually leave the meeting knowing what I
   need to do next time (Hunter)."
- "My job as a coach is to let them figure things out for themselves...I will help them with their thought process by asking questions and directing them towards what I think is the solution, but I won't just give them the answer ... You don't want them to rely on you all the time and think that they can just call you for any answers. They need to be independent ... but if they're drowning, I am here to save them (Raul)."

# Goal Clarity/Obtainment

Results indicated that "formal" coaching sessions – for example, coaching sessions conducted weekly in the office between the manager and salesperson – involved a discussion of weekly goals. In particular, coaches talked about what salespeople were supposed to do, what they have done, and what they will be doing moving forward. It seemed that salespeople were satisfied with the coaching session when the salesperson left the session with a clearer understanding of what hindered them from reaching their goals and what they needed to do to reach those goals.

• "... during the meeting, we talk about the goals that we set last time and where she is at now, and how I can help if she is not where she needs to be ... I want to make sure that when my rep leaves the meeting, she knows exactly what she needs to do the next time so that that problem that she was having does not happen again (Jenny)."

# Motivation/Inspiration

Salespeople indicated that an effective coaching session left them motivated and inspired. Further, salespeople

indicated that when they felt motivated and inspired, they were driven to implement the coach's recommendations and more optimistic about their future performance.

- "I would consider it an effective coaching session when I leave really excited and motivated to get things done ... I am just the type of person that needs [my manager] to really push me and motivate me (Kourtney)."
- "A coaching session could be effective even if it just gets me energized afterward... It's like what a football coach does with his team ... to just get them motivated (Ricardo)."

# Relationship Between and Among the Factors

Based on the interview results, we can build a model of coaching that integrates perspectives from both the manager as coach and the salesperson as the coachee. From the manager's perspective, the manager first decides to engage in coaching (i.e., whether to start coaching or coach more or less frequently) with a salesperson. We identified three factors that affect the manager's decision to coach: The manager's perception of the salesperson's coachability, the salesperson's current level of performance, and the salesperson's selling experience. Next, the manager engages in coaching by adopting two broad coaching behaviors: role-modeling and helping behaviors. Role modeling behaviors include, for example, active and empathetic listening, asking questions, providing feedback, showing/teaching, and observing in the field (e.g., ride-along, listening-in on calls). Helping behaviors involve, for instance, providing resources (e.g., leads, information, input), giving immediate attention to the salesperson's request(s), sacrificing/making time to help, and selling with the salesperson. The manager's skills and behaviors change the effectiveness of the coaching behavior on the salesperson. These skills and abilities include the manager's sales knowledge, skills, and ability and his ability to adapt to the salesperson's communication style and management preferences. The quality of the manager's ability to help and be a role model determines the salesperson's effectiveness in the coaching session. Effective coaching sessions will indirectly result in various outcomes that drive sales performance, such as learning a new selling

knowledge, skill, or ability, solving a problem that the salesperson might be facing, helping the salesperson establish goals and holding them accountable, and motivating and inspiring the salesperson to perform. These outcomes of sales coaching impact the salesperson's performance directly.

From the salesperson's perspective, the effectiveness of the sales manager's coaching on the salesperson's performance will be contingent on the salesperson's level of trust towards the manager, which influences the salesperson's level of coachability or openness to seek and receive the manager's coaching. The salesperson forms trust in the manager in several ways. For instance, the salesperson will trust that the manager is there to help the salesperson succeed when the salesperson perceives that the manager understands the salesperson, i.e., understands the salesperson as an individual/person and understands the salesperson's situation and perspective. This trust is developed when the manager exhibits coaching behaviors that lead the salesperson to perceive that the manager is empathic, caring, and adaptive to the salesperson. Another way the salesperson trusts the manager is by trusting that the manager is providing feedback and recommendations that will help the salesperson perform at a higher level. In other words, the purpose and intent of the feedback and recommendations are more important than the manager's ability to provide feedback and recommendations, which is the focus of existing coaching programs. This trust towards the manager is also contingent on the salesperson's confidence in the manager's selling knowledge, skills, and ability.

#### DISCUSSION

This paper investigates the sales manager and salespeople-related factors that impact the sales coaching process from both parties' perspectives. Using a discovery-oriented method, we interviewed 25 sales managers and salespeople and gained a deeper understanding of the factors that affect coaching decisions, engagement, effectiveness, and outcomes. This paper contributes to extant sales research and provides several managerial implications that we delineate below.

#### **Academic Implications**

The shortage of previous sales coaching research provides valuable insights to academics and practitioners. However, sales coaching was studied from either the perspective of sales managers or salespeople but not both. In their review of the sales coaching literature, Badrinarayanan et al. (2015, p. 1088) assert that "very little is known on how the sales coaching process is influenced by salesperson, sales manager, sales coach, and organization-related factors." This paper addresses this gap by providing a better understanding of the mechanisms that drive coaching engagement, effectiveness, and outcomes from the perspectives of both sales managers and salespeople. Our results indicate that sales managers and salespeople have varying perspectives regarding sales coaching. By incorporating both perspectives, academicians can develop a better understanding of the sales coaching process and how each party influences it (Badrinarayanan et al., 2015).

One of the recurring themes in the results centers around the idea of adaptability. Sales researchers have primarily studied adaptability from the salesperson's perspective (i.e., the salesperson adapting selling strategies and behaviors to the buyer) on the buyer-seller side of the sales process (e.g., Agnihortri et al., 2017; Spiro and Weitz, 1990; Verbeke, Dietz, and Verwaal, 2011). These studies demonstrate that sales adaptability is positively related to sales performance. However, adaptability is also essential in sales coaching. Deeter-Schmelz, Goebel, and Kennedy (2008) mention that effective sales managers can coach and adapt to others. In support of this, our results indicate that coaching adaptability (i.e., sales manager adapting coaching strategies and behaviors to the salesperson) enhances coaching engagement and effectiveness. While salespeople need to adapt to their buyers, what is interesting is that our results indicate that salespeople do not adapt to their managers. On the contrary, salespeople expect their managers to adapt their coaching style to the salesperson's needs and preferences.

Another factor that emerged from the interviews is coachability. Shannahan, Bush, and Shannahan (2013, p. 41) define salesperson coachability as "the degree to which salespeople are open to seeking, receiving,

and using external resources to increase their sales performance in a personal selling context." The authors developed a sales coachability scale and found that highly coachable salespeople are better performers than those who are less coachable. In addition, Shannahan, Bush, and Shannahan (2013) found that transformational leaders (Bass, 1985) positively influence salesperson coachability. However, there is no mention of the specific coaching behaviors that might increase salesperson coachability. Our results show several ways in which managers can specifically influence salesperson coachability: (1) Aligning coaching goals and needs to the salesperson; (2) being authentic, caring, and selfless in their efforts to help the salesperson; (3) Adapting coaching style and behaviors to the needs and preferences of the salesperson.

Finally, the interviews elucidated several outcomes of sales coaching related to the salesperson. This paper answers calls for research by Badrinarayanan et al. (2015, p. 1104), who conclude that "barring a few studies, very limited empirical evidence exists on the outcomes of professional sales coaching." Some researchers have suggested that sales coaching can improve psychological outcomes, behavioral change, and performance (Belizzi and Hite, 1989; Rich, 1998). Others have asserted that sales coaching may influence ethical behavior, resistance to change, customer orientation, and job stress (Chonko et al., 2006; Honeycutt et al., 2001; Jaramillo et al., 2006). Our results show that salespeople find coaching effective when they can learn something that can help improve their performance, solve a problem that is preventing them from moving forward in the sales process, or gain a better understanding of the barriers and enablers to their sales goals.

#### **Managerial Implications**

In a recent survey, sales managers believe they are better coaches than they are based on assessment ratings by their subordinates (Edinger, 2015). One reason for the discrepancy is that managers are not coaching salespeople the way they want to be coached. The interviews provide sales managers with insights from the salespeople's perspectives regarding what makes them more coachable, what keeps them engaged, and the factors that drive coaching effectiveness. We discuss

this further below and offer recommendations on how sales managers can use the information to improve their coaching skills, knowledge, and abilities.

According to the Sales Management Association (2014), given the increased responsibilities of sales managers, many sales managers report that they have limited time to coach salespeople. As a result, sales managers tend to coach salespeople whom they believe are more open to coaching (i.e., coachable) and those they believe will benefit the most from coaching. Unfortunately, this often leads to less coaching for the lowest and highest performers and may result in less effective coaching. Therefore, based on the results, sales managers should focus on enhancing each salesperson's coachability by practicing empathy, strengthening rapport, adapting to the salesperson, and aligning coaching efforts with the needs of each salesperson. In doing so, sales coaching will enhance the performances among the salesforce rather than among a select few.

Moreover, our results showed that salespeople want coaching regardless of their level of performance or experience. This finding aligns with Allego's (2021) recent survey of 250 companies that found that 87% of salespeople want more coaching. Interestingly, our results suggest that each salesperson perceives coaching differently depending on their level of performance and experience. For instance, top-performing salespeople prefer to have their managers coach them through complex cases. In contrast, low-performers want their manager to coach them on parts of the sales process (e.g., business development, questioning strategy, etc.). Thus, managers must not ignore the low- or high-performers coaching needs.

The interview results also provide managers with several recommendations on improving coaching engagement and effectiveness. Given the limited time and resources, coaching is often conducted formally (i.e., scheduled coaching sessions) in the office. According to a survey conducted by Perlow, Hadley, and Eun (2017), 71% of managers say that these meetings are unproductive and inefficient. Our results indicated that salespeople find coaching is more effective with ride-along than role-plays (in the office) because sales managers can role-model proper techniques and behaviors and coach salespeople immediately after

calls. Hence, we recommend that managers devote more time participating in sales calls with salespeople when appropriate. It appears that ride-along is effective because the sales coach can observe the salesperson live (in the moment) versus talking about it and role-playing in the office where details may have been missed.

Furthermore, our results indicated that coaching is more effective when the sales manager can adapt their coaching style and behaviors to the needs and preferences of the salesperson. Based on the results, this can be accomplished in several ways. One, sales managers should demonstrate that they care about their salespeople. Coaching is necessary to help the salesperson achieve their goals rather than the sales manager's goals. When salespeople perceive that sales managers are only helping them to boost the sales manager's earnings, salespeople reported being less receptive to coaching feedback. In addition, when salespeople perceive that sales managers care about them, they are more likely to share personal information that can help the sales manager adapt to the salesperson and provide higher quality feedback. Finally, our results showed that salespeople prefer the sales manager to adapt to their communication styles and preferences. We recommend that sales managers administer communication style tests such as the DISC profile to understand each salesperson's style better. Once this information is obtained, sales managers will be better positioned to adapt to each salesperson. Alternatively, sales firms can assign each salesperson to a sales manager based on each others' communication styles. This way, sales managers can adapt to each salesperson a little easier when the communication styles are similar versus different.

#### **Limitations and Future Research**

Several limitations in this paper are worth noting. First, the results reflect sales managers and salespeople in B2B sales. It is possible that coaching may be different among B2C salespeople. Future research could explore the B2C sales coaching process and how that process is affected by factors related to the sales manager and salespeople. Second, we sampled sales managers with coaching experience and salespeople who are currently being coached.

Further research could investigate how salespeople who have not received coaching from their sales managers perceive effective sales coaching. Third, the data reflected salespeople in field positions. With the rise of inside salesforce among some sales organizations, it is important to determine how coaching changes between the two different types of positions to reduce costs. Fourth, all salespeople are involved in a consultative type of selling. Coaching may differ in a salesforce in which the dominant style of selling is transactional or relational. Finally, with the voracity of generational studies in sales (e.g., Loring and Wang, 2021; DelVechhio, 2009; Schultz et al., 2012), future research can explore generational differences among salespeople and sales managers within the sales coaching process. For instance, Loring and Wang (2021) find that Gen Z have a greater need for coaching and a desire for control. How will these needs affect the sales coaching process? What happens when there are generational differences between the sales manager and the salesperson concerning coaching?

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