Distance Management

DISTANCE MANAGEMENT
CONDUCTING MEETINGS/COACHING FROM A DISTANCE

Advantages:

Disadvantages:

<u>Workshop</u>

What might be some other advantages and disadvantages of conducting meetings, training and coaching by telephone?

To Avoid the Disadvantages:

1. Be Totally Prepared

2. Pre-Position Expectations

3. Substance

Confidence:

Manage the Process:

Briefing and Debriefing:

Briefing questions

Debriefing questions

Workshop

What are the 3–5 most effective briefing and debriefing questions you can ask during your calls?

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Inspecting What You Expect

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FiNAPs

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Workshop

What are other coaching opportunities that you could conduct via telephone?

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TIPS FOR UTILIZING DISTANCE MANAGEMENT

- Act like you are speaking face to face
  - Speak in the same voice tone you would use face to face
  - Utilize the same body language; stand up if necessary
- Picture the faces of those with whom you are speaking
- Always write down the names of the call participants
  - *Randomly* call on participants during the call - this will keep them engaged
  - When asking questions, call on a specific individual instead of saying, “Does anyone have any questions?”
- Remember to check-off the names of participants as they become engaged
- Be sure to appoint a “point person” in cases where you have a single location with multiple participants calling in.
- If asking the participants to complete a workshop while on the call either:

  -Give an amount of time to complete

  -Ask for confirmation of the completed task

  -Ask participants to advise you when they have completed the task

Sales/Closing Rounds Tip Sheet

STEPS	WHAT	DETAILS
Before the Sales/Closing Rounds (1–2 days before)		
Step 1:	Create a Rounds Team of no more than 3–4 people.	
Step 2:	Schedule weekly Rounds for each team.	
Step 3:	Select a case presenter.	• Let the presenter know that he/she needs to be prepared to present a Sales/Closing Rounds case to the team. • Rotate the case presenter weekly.
During the Sales/Closing Rounds (15–20 minutes)		
Step 1:	Previous case presenter updates team on results achieved from recommendations.	
Step 2:	Current week's presenter presents his/her Rounds case.	Provide the following information: • Sales intent (what the presenter is trying to achieve for the client). • Ethics behind the intent provided (why it's in the client's best interest). • What the presenter already tried.
Step 3:	Rounds team obtains additional information.	• Ask questions to gain full understanding of the case.
Step 4:	Team members make recommendations for specific actions the case presenter can take to close the sale based on the information presented.	• The focus of the team is to determine additional steps to close the sale. • Presenter writes an Action Plan based on the team's recommendations.

Sales/Closing Rounds Coaching Tool

Date:	Location:
Presenter:	Observer:
Rounds Case:	

- ❑ Case presenter presented a “real” client/prospect case and discussed what they have already tried.
- ❑ Case presenter stated the sales intent and ethics behind the sales intent.
- ❑ Sales/Closing Rounds Team made recommendations and created a plan *with* the case presenter for the case presenter to implement.

Post-Sales/Closing Rounds Activities

- ❑ Case presenter reported back to the Rounds team the results of implementing the recommendations. What worked/didn’t/and what is pending?

Additional Comments

Sales/Closing Rounds Template

Select a case that either you and/or someone on your team is currently working on. This should be a situation where a recommendation has been made that is in the best interest of the client. The case should be one where you are trying to close the business but are having difficulty finalizing the sale (i.e., it is not closed). Use bullet points to complete the following form.

Complete *before* the Sales/Closing Rounds

1. Describe the client (use a fictitious name)

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2. Describe the sales intent (i.e., what you are trying to sell the client)

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3. Describe the ethics behind the sales intent (i.e,. why you feel your recommendation is in the best interest of the client)

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4. Describe the steps you have already taken and what the results have been

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<u>Complete *during* the Sales/Closing Rounds</u>

List actions generated by the Sales Rounds Team

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<u>*After* the Sales/Closing Rounds</u>

- Implement action ideas.

- Provide feedback to the Rounds Team and share Proven Best Practices.

Sales Meeting Tip Sheet

Note: Sales Meetings can be conducted in person or via teleconference.

WHEN	WHAT	HOW
Before Sales Meeting		
By Thursday	**Select Topic** (New or Repeat)	• Select a Sales Meeting topic that is focused and will result in actions to implement immediately. • Select topics that will generate actions directly relevant to the participants. Manager-to-Manager Sales Meeting topics must generate leadership/ management actions, and Manager-to-Front-line Salespeople Sales Meeting topics must generate front-line actions. • It is not necessary to change the topic each week, but you do need to change the topic frequently enough to maintain enthusiasm and interest. If you do not change the topic, still hold a meeting, but focus on what is working best and refining, perfecting and/or building on the previous week's actions.
Thursday or Friday	**Announce Topic**	• Choose a specific topic that has high impact and can be immediately acted upon. • The topic can be chosen by the group or by you. • Provide rationale for the selected topic. • Ask employees to conduct a Big Five on the topic individually and bring their Big Five answers to the meeting. • Conduct your own Big Five on the topic.
During the Sales Meeting (20–30 minutes maximum)		
Monday	**Introduction** • 3 minutes	Briefly: • Make introductory comments, including: – Share success stories and acknowledge top performers, if not previously done. – Current week's focus. – Specific goals for the week. – Rationale for the topic and/or how it links to the vision.

WHEN	WHAT	HOW
	Run Big Five Workshop • 2–5 minutes	• Use the Writing First Principle. Topic Given in Advance – Give participants 1 minute to perfect their Big Five actions. Topic Given at Meeting or Topic Override – Give participants 2–3 minutes to develop their Big Five. **Note**: In-person sessions should have participants work individually or in pairs. • Instruct participants to prioritize their Big Five in terms of anticipated impact.
	Debrief • 2–5 minutes	• Use Pyramid Technique to collect brainstormed answers. • Ensure actions are specific and can be implemented immediately following the meeting without additional resources. • Challenge actions that are "business as usual"; push for incremental actions. • Briefly summarize the list as necessary to check for clarity, understanding, and agreement. • Gain agreement on prioritizing the team's top five actions that, if consistently implemented with high quality, would result in the maximum results. Voting Method to Quickly Reduce to the Big Five: • Review the list of all answers and ask each person to select (think about) their top two, as you review the list. • Review the list again and ask each person to indicate if the item was in his or her top two. In person, ask people to raise their hands to vote. During teleconferences, ask each person to state their name to vote. • Quickly count the number of votes and write the number to the right of the item. • Review the number of votes and rank-order the Big Five based on the greatest number of votes received. **Note**: Never give more than three votes to get to the top five.

WHEN	WHAT	HOW
	Obtain Commitments • 3–5 minutes	• *“What? How Much? By When?”* • Get commitments in writing during or immediately after the meeting. **Note**: It is not essential that the group agree to a specific Big Five for all participants. You can let participants select their specific actions from the group Big Five. (Make sure the group list is limited to agreed actions that actually achieve the objective.) It is better to have a few actions (from the Big Five highest impact) done well than to have all five actions implemented poorly. Remember: **Quality X Quantity = Results.**
	Close Meeting • 4 minutes	• State your personal commitments to contribute to the results. • Ask for questions/check for clarity. • Provide motivational close: – Statement of confidence. – Pre-position follow-up and coaching. – Remind them of the value to the clients. – Sincere appreciation.
After Sales Meeting		
Tuesday	**Follow Up**	• Ensure that Sales Meeting results have been incorporated into daily Two-Ways Plans.
By Wednesday (Follow up throughout the week, as appropriate)	**Debrief Sales Meeting Results**	Via group or one-on-one. Analyze results: • Check each team member’s progress against his or her commitments. • If they are working, gather and Cross-Pollinate Proven Best Practices. • If they are not working, conduct Objections Clinic or Reverse Sales Meeting, as needed. • Enhance action plans as necessary and pre-position continued follow-up.

Sales Meeting Coaching Tool

Date:	Location:
Facilitator:	Observer:
Topic:	

- ❑ Topic was clear, focused, and directly relevant to the level of participants and immediately actionable.
- ❑ Topic was announced prior to the meeting (i.e., Thursday or Friday).
- ❑ Participants and Facilitator came prepared with the five most powerful actions to achieve the desired outcome in writing.
- ❑ Successes were briefly recognized (i.e., 2–3 minutes).
- ❑ Current week's focus and goals were briefly discussed (i.e., 1–2 minutes).
- ❑ Facilitator provided rationale for Sales Meeting topic.
- ❑ Conducted Big Five Workshop on the Sales Meeting topic.
- ❑ Determined five powerful and focused actions that could be implemented immediately following the meeting.

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________

- ❑ The meeting ended with commitments (What? How Much? and By When?) for each participant.
- ❑ The Facilitator recorded the commitments.
- ❑ The Facilitator made their own commitments.
- ❑ The Facilitator pre-positioned that they would be following up with each participant.
- ❑ The Facilitator checked for clarity before closing the meeting.
- ❑ The Facilitator closed the meeting on a positive note.

End-of-Week Debriefing Tip Sheet

Before End-of-Week Debriefing		
❏	Debrief throughout the week to gather specific results and Proven Best Practices. The more data you have prior to the End-of-Week Debriefing, the better it will be.	
❏	Distribute week's results to team prior to meeting. If results were not gathered ahead of time, gather at debrief.	
❏	Provide team with summary of week's results (both activity and performance) versus commitments prior to the meeting.	
❏	Pre-position top performers to share specific detailed actions and the Proven Best Practices that generated their results.	
During End-of-Week Debriefing (maximum of 20 minutes)		
STEPS	**WHAT**	**DETAILS**
Step 1.	Make introductory comments and review results.	• Summarize the team's activity results versus commitments. • Summarize the team's performance results versus commitments. • Briefly comment on both activity and performance results.
Step 2.	Share a few success stories.	• Acknowledge top performers. • Ask top performers to share activity and performance results.
Step 3.	Obtain the "details."	• Randomly call on 3–5 people and ask what results were achieved. • What happened? • How did it happen?/What did they do? • What worked?/What didn't work? • What will they do different next week, if necessary?
Step 4.	If Proven Best Practices were identified, communicate them. Ideally, ask the Best Practitioner to explain what they did.	• Obtain commitment from team members that they will implement the Proven Best Practices immediately.
Step 5.	If there were any gaps: • Identify the gaps. • Determine what can be done differently.	• Ask probing questions to determine why there were gaps. • Brainstorm with team what to do differently to close any identified gaps.

Step 6.	Announce/Restate topic for next week's Sales Meeting.	• Pre-position the topic for Monday's Sales Meeting. • Remind participants to conduct their solo Big Five prior to the Sales Meeting.
Option	Share commitments.	If conducting the End-of-Week Debriefing via telecon-ference, randomly call on one or two participants and ask the following: *"Based on what you heard on the call today, what will you do differently next week?"*
Step 7.	Close the End-of-Week Debriefing.	• Pre-position that you will be following up on their commitments. • Close the meeting by giving a positive/motivational send-off to team members. • If possible, reinforce the vision.

End-of-Week Debriefing Coaching Tool

Date:	Location:
Facilitator:	Observer:

Please place a check mark for all completed actions.

❑ The Facilitator summarized results (both activity and performance) versus commitments prior to the meeting.

❑ The Facilitator distributed the results to the group prior to the meeting. If results were not gathered ahead of time, results were gathered at the debrief.

❑ The Facilitator pre-positioned top performer(s) to be prepared to share detailed actions (Proven Best Practices) that achieved performance results.

❑ Briefly reviewed the team's/unit's overall results and commented on performance.

❑ Top performers shared specific detailed actions (Proven Best Practices) that generated their results.

❑ Proven Best Practices were identified and/or shared.

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❑ If Proven Best Practices were identified, Facilitator obtained commitment from participants to implement them immediately.

❑ Facilitator recorded commitments and pre-positioned follow-up.

❑ If team performance was not satisfactory, Facilitator asked probing questions to determine why.