



Data-Driven Coaching Guide

A step by step guide to propelling
your revenue team's performance to
new heights

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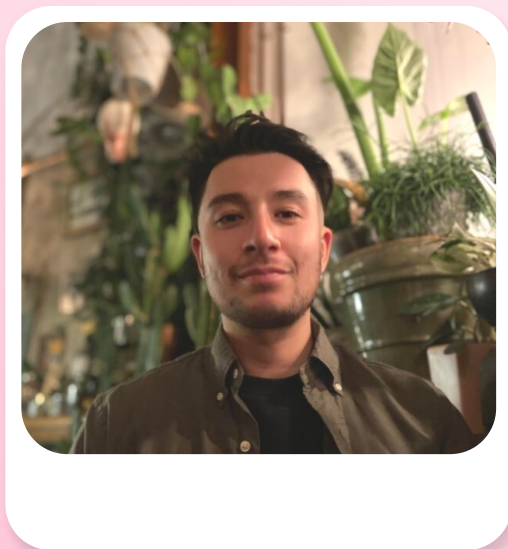
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Jack Bateman-Chuah

Product Marketing Manager

Do people write bio's about themselves or do they get other people to do it for them? One seems rather narcissistic and the other rather egotistical. I've taken the narcissist route so I can control the narrative.

Sue me.

Jack is a brilliant Product Marketing person, one of the best IMO. A man who brings video to everything (stay tuned for the video version of this guide) - this guide is designed to transform those who are apprehensive about how to even start with coaching become Data-Driven Coaching pro's.

Introduction

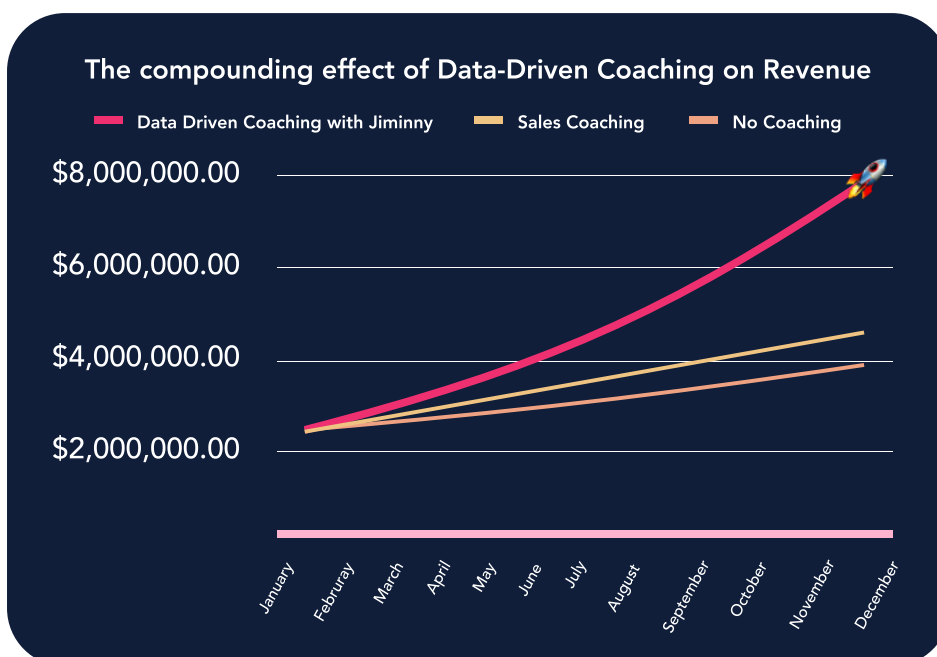
Sales used to be a lot more binary when it came to performance. Good performance was reserved for those who hit target and performance reviews were for those who didn't. However, the truth is that life is just more nuanced than that and those with better results may not be performing at the levels these results suggest.

Companies that invest in sales coaching see an average of 19% increase in sales performance 🚀 -Gitnux, Sales Statistics 2023

Conversation Intelligence has helped to evolve the way in which we look at sales performance, providing insights into every customer interaction and actionable data to drive better performance in a consistent and measurable way.

But with all this visibility, it created a challenge of focus. Where do I focus my coaching time in order to yield the maximum results? We live in an era of endless data and too many companies are victims of insight overload these days to be truly effective.

Data-Driven Coaching solves this issue by combining the best functionality of Conversation Intelligence with automated tools and a clear best practice framework to identify at scale which reps need the most attention and which areas will yield the biggest return on investment.



** Data sourced and compiled from [Jiminny.com](#), [SaaS Capital](#) and [ScaleExp](#)

What is Data-Driven Coaching?

Overview

Data-Driven Coaching is an approach to coaching that uses data and analytics to inform and guide coaching sessions.

It involves collecting and analyzing data on a regular basis to gain insights into an individual's performance, behavior, and skills. This data can come from various sources such as sales metrics, call recordings, customer interactions, and performance reviews.

The Purpose of Data-Driven Coaching

The aim is to help managers and reps identify areas of strength, areas for improvement and help them own their development.

This enables either rep, manager or a combination of the two to develop a personalized coaching plan which focuses on incremental improvement. At this point, it's worth mentioning that data is an indicator to be used to your advantage, not the only tool in your toolbox.

The coach can then tailor their coaching sessions to address these specific areas, using data to track progress, encourage self improvement and measure results over time. It's like a fitness tracker for your sales game, except instead of steps, you're tracking deals closed and money earned. Who wouldn't want that kind of motivation?

The Impact

Data-Driven Coaching is particularly effective because it provides objective and measurable data and actionable feedback.

If implemented correctly, Data-Driven Coaching is a powerful tool for improving performance, and it is becoming increasingly popular in many industries, including sales, customer success, and management.

“You can only affect performance, you can’t directly affect results. Control the controllables and the results will come” - J Bateman-Chuah (2023)



What value does Data-Driven Coaching provide?

Let's talk facts and figures then, what value is this framework bringing to the table?

Objectivity

Data-Driven Coaching provides objective and measurable insights based on real data and analytics, rather than subject opinions or biases.

This helps remove reliance on personal opinion alone and introducing data to the conversation, allowing coaches to focus on the areas that will have the greatest impact on performance.

Personalization

Using data to inform decisions, coaches can provide more personalized and targeted feedback, tailored to each individual's specific strengths and weaknesses.

Sales coaching and mentoring are cited as the most important role that frontline managers play, according to 74% of leading companies. ([Gitnux, 2023](#))

Performance Improvement

Identify areas for improvement and develop targeted coaching plans to address these areas.

This results in faster and more sustained performance improvements, which translate into increased productivity, revenue, and customer satisfaction.

Accountability

Create a culture of accountability, where individuals are responsible for their own performance and are actively seeking opportunities for improvement.

Reps who take control of their destiny are far likelier to be successful for the long term and that kind of empowerment is something we definitely want in our lives.

Who can be a coach?

I know what you're thinking, ah wow this sounds great I'd love to implement this but I don't know if I'm qualified to become a coach...

Let me stop you right there, get those intrusive thoughts out of your head. Anyone can be a coach and here are some methods you can implement.



Manager-led Coaching

Manager led involves the team manager reviewing data on team performance and working with individuals to create development plans that work towards a communicated objective.

The benefits of adopting this approach is that it helps foster better team togetherness, improves employee engagement and helps that team achieve their full potential. It can be quite time intensive for the manager depending on the size of the team.

Self-Coaching

If you have the data available and you're able to be honest enough to identify areas in your game that can be improved, self-coaching can be a transformational process. It has a low resource requirement as it's individual led and so as long as you're measuring the correct activities to results and you are disciplined in allocating a set time each week to review, there are major benefits that can be achieved. And remember, self-coaching is a practice for everyone in the team - especially those in a customer facing role. You can learn so much from the voice of the customer to transform your own growth trajectory.

Peer to Peer Coaching

This is best for mixed experience teams who are open to learning from each other and feel comfortable doing so, peer to peer coaching can be a brilliant tool to draw on that experience for the collective benefit of the group.

The responsibility is spread across the team so there is less pressure on the manager to lead everything. We normally recommend each team member puts up 1 good + 1 challenging meeting each week for the team to listen to, review and provide feedback. This process keeps everyone accountable, improves team cohesion and builds stronger revenue teams if implemented successfully.

	Coaching	Training	Feedback
Frequency	Regular and Consistent	One Off	Can be either
Target Audience	Individual or group	Generally a group setting	Can be either
Personalization	Yes to the individual	Generally generic to all	Varied
Objective	Individual performance improvement	Teaching specific curriculum	Provide steps to get from A to B
Time requirements	Regular time required	One off session	Both

Coaching vs. Feedback vs. Training

Coaching is a personalized and ongoing process that focuses on individual growth, skill development, and reaching potential. It involves a collaborative relationship between a coach and an individual, with the coach providing guidance, support, and customized strategies. Coaching helps individuals identify areas for improvement, set goals, and navigate their journey towards success.

Feedback provides specific information about an individual's performance, highlighting strengths and areas that need improvement. It can come from a coach, trainer, or peers, and is often delivered in a concise and timely manner. Feedback helps individuals understand their current performance, make necessary adjustments, and enhance their skills and abilities.

Training is a structured process that aims to impart knowledge and teach specific skills to a group of individuals. It follows a predetermined curriculum and learning objectives, often through workshops, courses, or classroom instruction. Training provides standardized content to enhance proficiency in a particular subject or domain.

In summary, coaching is a personalized and ongoing process for individual growth, feedback offers specific information about performance, and training provides standardized instruction to enhance skills and knowledge. We see the process as Training first to teach and build a foundation, Coaching to drive incremental improvements from this foundation and Feedback the information that takes you from each step to the next.

- A note from an esteemed guest, ChatGPT 2023

How do you implement a Data-Driven Coaching strategy?

Ok coach, let's get down to business.

It all sounds very interesting and good but this is where a lot of guides fall down, they don't give you the actual steps you need to implement this strategy or it's gated unless you sign up to a mailing list.

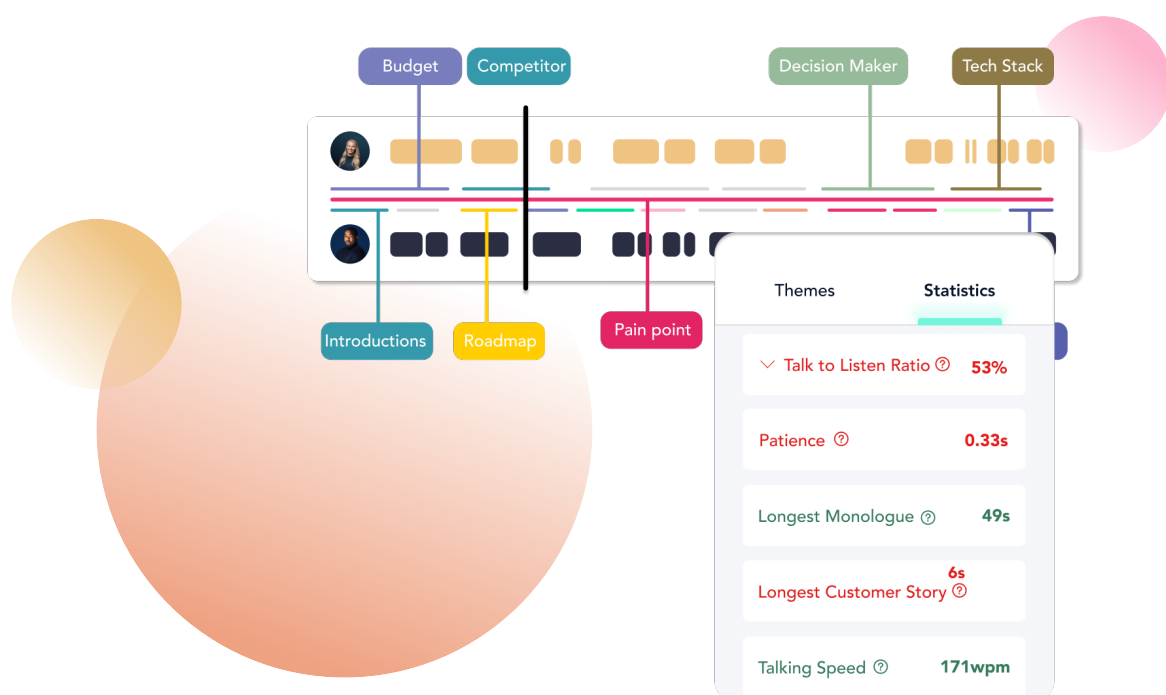
We're not like that so here are some tips to getting started on your Data-Driven Coaching journey:

1. Identify the Insights you can't see today

You need to start with a method of tracking each and every customer interaction in order to start pulling the data on activity and performance.

This means that whether it's a cold call, customer QBR meeting or an outbound email you need to understand how these interactions could be improved and to generate more revenue.

This visibility is the basis for Data-Driven Coaching and a fundamental component of successfully embedding this process.



2. Reporting on what actually matters

Every business is different and so what you track should reflect these differences.

For example, SaaS BDR teams will look at the number of successful connections to prospects as a key metric that drives the number of meetings booked. We can then define best practice when those connections are successful and coach how to maximize each interaction to generate more meetings.

You need to really think about the metrics that drive best practice for you, this can be activity based, best practice guidelines, methodology tracking. We recommend looking into the overall Themes and Topics that drive your meetings to understand what trigger words define best practice.

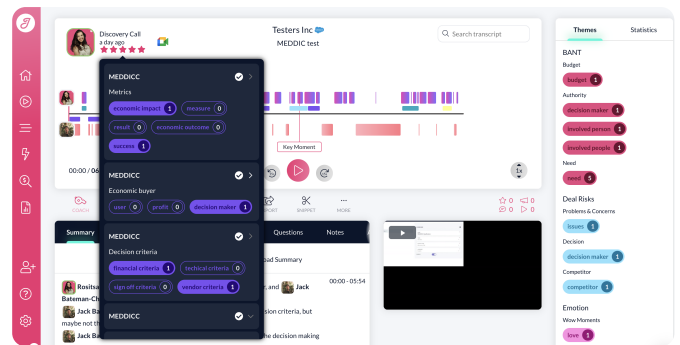
There's a whole range of things to consider but it pays to nail down the actions that drive the best results within your organization.

We recommend evaluating what good looks like as soon as realistically possible and running regular reviews of this benchmark to understand how trends change over time. Knowledge is power after all!

3. Automatically score every conversation

Let's talk some hypothetical stats for a second:

- BDRs make an average of 300 calls per week
- AEs average about 15 meetings a week



By my calculations, that's a s***load of outbound activity that needs to be recorded, analyzed and then personalized into coaching.

That's where Automated Call Scoring (ACS) comes into play. It's not about having the data, it's about knowing exactly how to focus your time and with ACS we can identify out of your 300 BDR calls, which five you should prioritize and why. #worksmarternotharder



4. Coaching Frameworks

Once you've prioritized your five key calls to review, you need a way to grade and understand why they've been flagged for review.


Coaching frameworks are a brilliant way to standardize what good looks like and identify clear performance improvements that can be measured. As it is a consistent framework, this enables individual feedback, team feedback or manager feedback to be delivered in a consistent format. (e.g. A good discovery call looks like this but a good demo call looks like this)

We recommend defining different frameworks for different types of activities to get really personalized and help to introduce best practice behaviors into every customer interaction.

For example, you may want to see a listen ratio of over 60% on initial discovery calls and that your rep has fully BANT qualified the prospect before ending the call.

5. Track team progression over time

Who doesn't love a success story? The team member who was lagging behind but put in the hours to reach the top. The glow up montage of them grinding and dialing day in day out. Inspirational stuff.



That's what we want you to experience and you can if you utilize performance tracking data to identify who's really adopting the feedback and growing as a professional.

Finally, don't forget to set benchmarks for best practice so that you can really see who your top performers are and identify those that need coaching.

I want to implement Data-Driven Coaching into my team.

...how do I get started?

Good question and I'm glad you asked.

The truth is that you need five components to start on this journey:

Define what success looks like and which activities power this.



Get buy in from all those involved, you'll have all the tools you need but you need to get collective buy in to make a meaningful change.



Find a solution to capture, analyze and measure the activity data so you can track improvements over time.



Consider tools that automate and highlight key meetings or calls where coaching will have the biggest impact.



Have a genuine willingness to embrace the Data-Driven Coaching process - it's about continuous improvement so you need to be dedicated.



Build it into your routine; find time each week to review, coach and align your activities to clear performance goals.



**Coaching Hats are not mandatory but heavily encouraged...especially if Pink!*

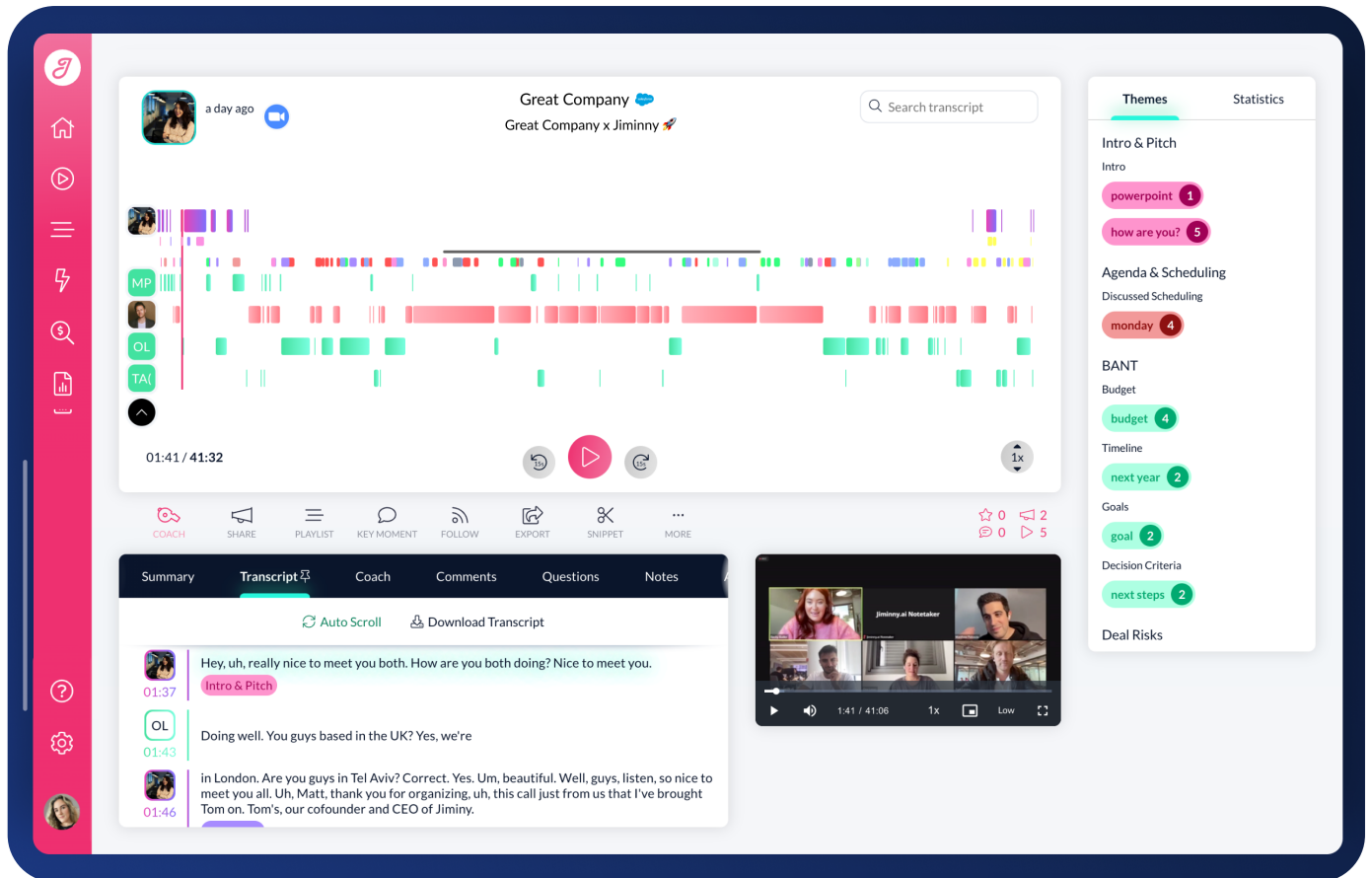
Some Top Tips for you - our do's and don'ts

Do's:

- ✓ Keep it simple with feedback, what went well and what could I learn from for next time?
- ✓ Get your team to coach themselves and each other - would an athlete not watch back game tape?
- ✓ Action the data and statistics you have access to - e.g. What was my talk ratio?
- ✓ Use a sales methodology and track it for consistency.

Don'ts:

- ✗ Leave 10 bits of random feedback / comments on one call - who is that helping?
- ✗ You can't just tell people what to say and basically make them a puppet, this process has to spark change from them. You're a guide, not a puppet master!
- ✗ You can't coach what you have not trained in!
- ✗ Not having a framework to coach from for consistency.



And Finally...

Data-Driven Coaching is not a pipe dream, it is a viable and lucrative prospect for each and every individual or team.

There is so much available data on performance, that there is no excuse if you really want to accelerate your career and become a true high performer who is consistently surpassing expectations.

If you treat this process like exercise to plan a routine, be disciplined enough to show up every week and always give it your all - the results will surprise you and a year from now you'll be unrecognizable.

So don't be shy, embrace the data, embrace coaching. And embrace the journey of becoming the best version of you.

Wow, you read the whole thing - I'm impressed.
What a well learned individual you are.

If you want to understand more on
implementing Data-Driven Coaching and kick
start the process, head over to our website to
book some time with the team.



www.jiminy.com

