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Managers, reps can make the most of joint calls

Denver Business Journal - by [Garry Duncan](#)

Has your boss ever said, "I'll be riding in the field with you next week; what time shall we meet?"

These words can evoke negative feelings in both sales representatives and managers. Because joint calls can be painful and time-consuming, many managers and representatives consider them nonproductive.

But in reality, they can be a highly valuable asset for the salesperson, manager and company.

It takes a change in perspective to view joint calls in a positive light. For example, take the salesperson with a tough sales manager. Initially, the representative planned each joint call day with easy calls to ensure the manager experienced a good day. Then he realized he might be giving the impression the job was too easy.

He then started lining up calls with all the worst customers and prospects he could find every time the manager visited. Finally, he realized the manager had seen it all and that the best coaching came from mixing good calls with tough calls. Once he became comfortable that the manager was there to help, he shifted his perspective and began looking forward to their time together.

Well-done joint calls are one of the most productive tools to grow sales. Sales representatives can take advantage of the manager's power and experience to make the most of these field trips.

Use them to impress and gain loyalty from your best customers. Customers feel honored when the top brass personally thanks them for their business, and this can help avoid the most common reason for lost customers -- lack of appreciation.

This also can be the time to build rapport with your manager and get his or her undivided attention. Discuss new ideas you want to try, and give input on issues such as customer service, marketing, order processing and other items that affect your job.

Personal growth and honest feedback are realistic goals during joint calls, so use your manager's coaching to enhance your value to the company and to groom yourself for potential promotions.

Even average sports teams often get better with new and insightful coaching.

A different set of eyes on a particular sales challenge can often reveal new options and answers.

One sales representative had been working with a company's purchasing agent for months without progress. During discussions, an end user in the room displayed negative body language, and the sales manager pointed this out after the call. Until then, the representative hadn't realized the end user was feeling ignored and lobbied against the proposed change.

Use your manager and these opportunities to brainstorm and prepare different approaches for specific sales targets. Two heads are usually better than one.

Two reasons dominate why salespeople don't accomplish what managers expect. First, they think they're doing what the manager wants. Second, they don't know how to do what the manager wants. Feedback easily fixes both reasons.

Doctors teach medical students they should always observe the patient and not rely solely on lab tests. The same advice is good for sales managers. Observe the representative in action. Joint calls can be the best way to diagnose and fix sales errors.

Great sales managers know how to inspire and get the best out of people, both top performers and weaker representatives.

It's tempting to spend the most time with newer or weaker sales representatives, but top performers should receive as much or more attention. If the manager wants to grow sales, the return on investment can be faster and greater when working with top performers than with those who are struggling.

Joint calls provide the manager an opportunity to reinforce good behaviors and skills, give accolades, gain loyalty and identify best practices to share with others. All-star athletes have a coach. Star salespeople also need a coach or mentor.

Remember these tips:

- Take the word "you" out of your vocabulary.

Use third-party coaching language, such as "experience suggests," "research shows" or "another option would be." The word "you" has a tendency to raise defensiveness in those receiving feedback.

- Managing is getting things done through others.

Let the representative run the call, whether or not it's going well. They will learn skills best by doing them, and they will learn more from their own mistakes.

Pre-brief the call and debrief the call -- but don't run the call. If you must give information or answers during the call, be sure to give control of the call back to the representative after your input.

If the prospect feels the representative isn't trusted to run the call, they could doubt the representative's authority to fix future problems or handle other requests.

- Finally, use mistakes as a lesson learned, not as a whipping tool.

Risk is easier in a safe environment, and successful selling requires taking reasonable risk.

Make your joint sales calls count and watch your profits grow.

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