

In this article, David McWhir, a performance coach who works with relationship managers, fee earners and sales professionals across a wide range of sectors including law, accountancy and financial services offers his thoughts on how to coach client facing fee earners and sales professionals during a recession.

Ten Tips for Coaching Your Client Facing Team during a Recession

Whilst coaching has formed a key part of effective management development for many years, over the last five or so, there have been many who have questioned whether coaching sessions make best use of “front line” professionals’ time. The argument goes that in a booming economy, there is an opportunity cost in taking sales teams and relationship managers away from the “coal face” when there is so much business going around, needing someone to deal with it as it comes in. The reality seemed to be that even with average relationship management skills, it was possible to secure new business and close deals, and even if you didn’t, there would be several other opportunities on the way.



For many, there was little or no incentive in taking time out to improve skills through coaching as even less skilled individuals were apparently successful. Add in the perception that coaching and feedback were seen as remedial processes for the underperforming and we can understand how business coaching was not as widespread as perhaps it deserves to be.

Over the last year, in our experience, there has been a perceptible rise in how seriously coaching of those responsible for developing and maintaining client relationships is being taken. Whether it is a matter of correlation or causation, I cannot be certain but I have a real sense that this new willingness to reflect on and assess one’s capability and performance has arisen, at least partly, from a general decrease in levels of business during the current downturn in the global economy.

There may be two reasons for this change of heart. Firstly, if fewer business meetings and related activities are taking place, people have more time in which to undertake training and personal development. Secondly, and in my view more importantly, when there are less business opportunities available, it becomes more important to be successful when such an opportunity does arise. The way to win business is to outperform competitors across all the criteria used in selecting a

preferred provider or business partner. Now there is a real incentive in better understanding the key decision making processes and how an individual or a team can operate more effectively in its interactions with actual or potential clients. A wrong impression created during a meeting or a spelling error in a document could be sufficient to put you out of contention in such a competitive environment.

These are ten key tips I use in working with relationship managers and other client focused professionals to improve their performance in an increasingly difficult market:

1. Open yourself to feedback from clients, colleagues and friends – don't just pay it lip service. Ask for feedback and mean it. Appreciate the competitive edge that feedback gives – a means of receiving information that allows you to continuously fine tune your performance. No-one can improve within a vacuum. – so don't create one through an adverse attitude to feedback.
2. Remind yourself that coaching is as much of a benefit to high performing individuals as it is to those with greater developmental challenges. The best can always become even better, using incremental improvements to retain their competitive edge. Do you think that the Olympians aiming to qualify for 2012 are focusing on the qualifying times and distances required for 2008? Standards are continually being raised by others so remaining still is not an option. Feedback enables you to monitor the increasing standards expected from your clients.
3. Organisations which develop and promote a coaching culture create an environment in which continuous performance improvement is a way of life. The "Red Arrows" aerobatic team always run a full debriefing following every performance. Their culture, far from being one of failure, is one of attaining excellence through small improvements. As with Woodward's successful Rugby World Cup winning team of 2003 and the victorious UK 2008 Olympic cycle team, every possible component of the performance, including preparation is analysed. No-one is too good or too perfect to be exempted from feedback on how to improve.
4. Understand the difference between intent and impact. Accept that colleagues are intent on performing to the best of their ability; however, the impact they have on you, their team or their clients may not be visible or apparent to them. Agree with them to provide feedback on the impact they are having, giving them a perspective that allows them to modify that impact through changes in behaviour. Conversely, remain aware that your own performance and behaviours will be perceived by others in a way that differs from your own viewpoint. Everyone has a different perspective and the way to

discover how you are impacting on someone is to ask them.

5. Appreciate that winners become winners because their “cruising capability” is higher than those around them. They work hard at making their “bad” or “run of the mill” performances better than most other people’s best performances.
6. Jack Canfield in “The Success Principles” suggests that you are the average of the seven people with whom you spend most time. If the immediate environment is not one in which you are thriving and improving, then change it to mix with people who inspire you, not pull you down.
7. As someone’s manager and coach, carefully monitor the language and words that you use. Your aim is to get them to perform better, not reduce their confidence. It’s not about being soft on them – it’s about giving them specifics to work on and in encouraging them to find ways themselves in improving their performance, even when you are not present.
8. Encourage the teams for whom you are responsible to focus on their personal brands. Remind them that they create impressions in everything they say, in everything they do and in every document they issue. Personal brand has to be actively managed to ensure clients and colleagues see professionalism at all times, even on a “bad day”. Aim to make the aspirational achievable.
9. Key to personal brand is the concept of self awareness. How aware are you of the impact you have on others and the way you come across? Do you truly understand how others see you and what it is in you that they perceive as positive as well as less positive? If a relationship is not working, take time to find out why that is – it may simply be a clash of styles or a misunderstanding of your intentions. If you don’t investigate, you won’t find out.
10. Don’t assume that you are too good to be better.

David McWhir would be pleased to discuss any specific training or coaching issues and can be contacted on **08458 73 74 98** or at david@cvperform.com

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