# How Sales Managers Can **Maximize 1:1 Meetings**

*Backed By Data*

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# PREFACE

This guide is intended to serve as a baseline for managers and should be tailored to what works best for your style, your team, and the personality of each individual you coach.

Here's a framework to get started or to strengthen the 1:1s you're already having.

### Frequency:

Weekly — any less and performance issues may not get the attention they deserve, compounding over time.

### Length:

30-minutes.

### Participants:

Every contributor on your team. Meeting with just a select group like stragglers or new employees can create dissatisfaction with those who are overlooked.

*"Don't make the mistake of filtering your 1:1s to just those who you think need it most. While top, low, and new performers might be top of mind, those in the middle of the pack are your most effective change agents. If you take their productivity and increase that by 10 or 15 percent via weekly check-ins, that's going to be your most valuable time spent."*

**TRACY FRY**
*Director of Sales, Yesware*

| EFFECTIVE 1:1 MEETINGS | INEFFECTIVE 1:1 MEETINGS |
|---|---|
| ✓ Establish or confirm objectives | ✗ Stray to distractions, tangents, or gossip |
| ✓ Give clarity to expectations and performance | ✗ Are unclear or not comprehensive, staying to surface level or focusing on one detail |
| ✓ Provide and receive feedback | ✗ Are one-sided rather than a two-way conversation |
| ✓ Increase engagement & motivation | ✗ Lack constructive and actionable feedback |

# Mastering 1:1 Meetings: The Structure

# PART 1: BREAKING THE ICE (5-10 MINUTES)

1:1 meetings are your biggest opportunity to establish and grow trust. Dedicate time to building rapport and asking questions before you dive into the details of performance.

**Why you can't afford to skip this:** Building a close relationship makes you more effective as a manager and increases performance. Companies with highly engaged employees are 21% more productive, 22% more profitable, and have 65% less turnover.

## 1 TUNING IN

**Start the meeting with open-ended questions that will help unveil their state of mind:**

"How are you?" | "What's your day been like so far?" | "Get me up to speed - what's your week been like?"

> *"This is your best shot during the week to catch up with your rep to see how he or she is doing professionally and personally — which is just as important. If they're having a down month, it could very well be something outside of work that's affecting their productivity. You're the mentor; humanize your meeting and look beyond work itself. It helps you address obstacles and show your reps how to work through them."*

**JOEL FELCHER**
*Sales Manager, Yesware*

### What to do with the information:

**If the rep is feeling confident, energized or excited:**
Note what's driving it. Learning what motivates them helps you replicate success down the line.

**If the rep is feeling discouraged, unconfident or unmotivated:**
Identify the mood and ask, "what's causing you to feel this way?" Offering advice or taking action to solve a problem can help turn their outlook around and strengthen trust.

**Yesware TIP**

**Use Perceptive Listening**

**WHAT IT MEANS:**
Genuinely understanding what matters to the person who is speaking. As a manager, it helps you better address a rep's concerns or weaknesses.

**THREE TIPS FOR PERCEPTIVE LISTENING:**
1. Listen closely to what's being said (what you're already doing).
2. Consider what the person isn't saying (beliefs and feelings behind the words).
3. Tune-in to the speaker's body language (eye contact, shoulders, and feet).

***Note:*** *Meeting your number is what matters, but a rep's happiness is an irreplaceable ingredient to high performance.*

## 2 HOW YOU CAN HELP

**Ask for feedback on how you can better support the rep:**

Even the most experienced, skilled managers should be open to new ways of thinking about how they manage. You may be unaware you're holding a rep back from success. Or, you may be unaware you're helping the rep flourish.

**Why it's important:**

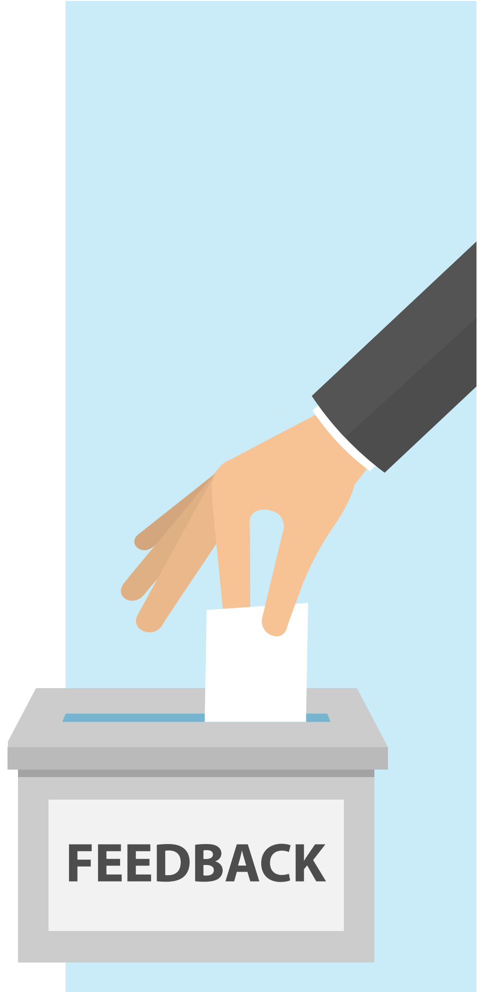
When you ask for feedback about yourself, you demonstrate that rep is a partner in the conversation, not a target.

**To find out how you can help your rep overcome outside obstacles, ask:**

- "What roadblocks do you have that I can remove?"
- "What can I do to help you be successful?"

**To get feedback about what you can do to manage better, ask:**

- "Do I do anything that gets in the way of your success?"
- "What else do you need from me to support you?"




**Yesware TIP**

**Ask Clarifying Questions**

**WHAT IT MEANS:**
Clarifying questions help clear conversations of potential misunderstandings. They're a great tool for managers receiving feedback because having an accurate understanding of a situation helps you see it from the rep's perspective.

**TWO EXAMPLES OF CLARIFYING QUESTIONS:**
1. "So, what I heard you say, is...[summarize what you're hearing]. Is that right?"
2. "It sounds like [paraphrase what you're hearing]. Did I get that right?"

### Next Steps:

*State deliverables and who owns them. Take note from former Apple CEO, Steve Jobs. After every meeting, Steve assigned a Directly Responsible Individual (DRI) — someone accountable for completing each task. Assigning someone with a task makes them more likely to get it done for the next meeting.*

# PART 2: DIG INTO THE DATA (15-20 MINUTES)

83% of what is being tracked in most CRMs won't help you coach reps to improve sales, according to recent research. Focus on the metrics that provide actionable advice on how to improve your team's efforts, something we call prescriptive analytics.

## COACHING SALES DEVELOPMENT REPS

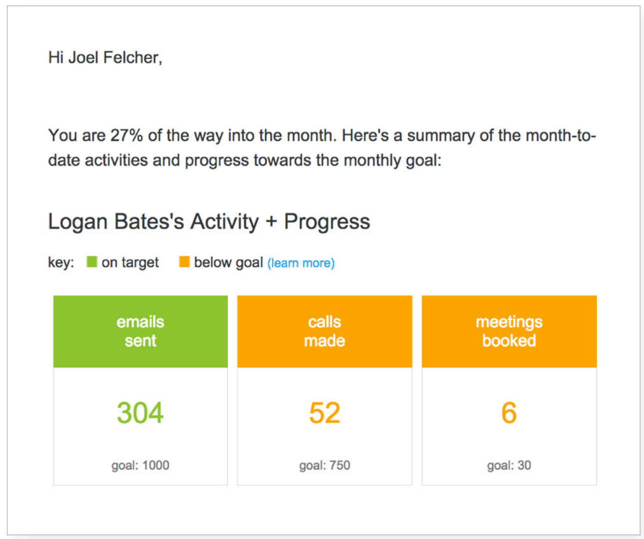
When you sit down with your rep, here are three performance metrics to focus on:

### 1. Month-to-date sales activities

Look at your rep's total number of calls, emails, and meetings booked to gauge productivity. Each of your reps needs to put in enough activity for your team to make its numbers.

**Where to find this data:**

Outside of the usual dashboards in Salesforce, you can set up weekly emails to arrive to your inbox before each of your 1:1 meetings.




*Here's what you need to look out for:*

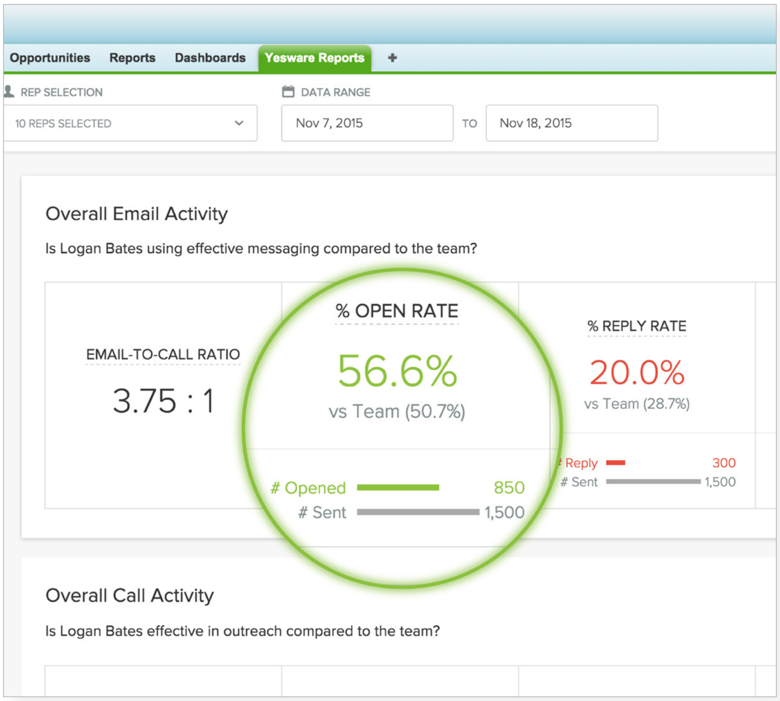
| PRODUCTIVITY | WHAT IT MEANS | YOUR TAKEAWAY |
|---|---|---|
| **High** | Your rep is running through activities very quickly.<br>While a high volume of calls and emails look good on paper, if the meetings are low, there's a problem. | • If meetings booked are **high**, ask your rep what he/she is doing so you can replicate it across the team.<br>• If meetings booked are **low**, review the emails your rep is sending and role play a call scenario. |
| **Average** | Your rep is on par with other members of your team. | • Find what's working well and have them focus on that.<br>• Identify one area of improvement and brainstorm together a strategy to test. |
| **Low** | Your rep is spending too much time on researching, writing emails, or having phone calls with unqualified prospects. | • Identify ways that your rep can save time--i.e. Using a prospect research doc, saving emails as templates, and/or with a mail merge tool. |

## 2. Email Engagement Metrics

There are four metrics that tell the story about your rep's email prospecting performance:

- **Open rate**
- **Reply rate**
- **Bounce rate**
- **Email engagement vs. messaging**

Your rep's number of sent emails will give you an understanding of their productivity, but (outside of time management) the real coaching comes in with the engagement they're receiving.




*Here's what you need to look out for:*

| ENGAGEMENT METRIC | WHAT IT MEANS | YOUR TAKEAWAY |
|---|---|---|
| **Low open rates** | You and your rep should look at 1) the timing of email sends, and 2) the subject lines. | • Certain times (like weekends) perform better than others.<br>• Some words mark emails as spam.<br>• A/B testing can improve open rates. |
| **High open rates, low reply rates** | There may be a mismatch between what your rep's subject line and email, and/or there might not be any sense of urgency for the person to respond. | • Make sure that subject lines align with email bodies.<br>• Social proof and CC'ing a prospect's colleagues both increase reply rates. |
| **Low reply rates** | The email may have been sent at a time when prospects are not likely to respond, and/or it might not have been personalized. | • Coach your rep to personalize emails and test send times.<br>• Take a look at the email templates higher performing reps are using. |
| **High bounce rate** | The list your rep is working from might not be clean; hard bounces in bulk mean that email addresses are incorrect or there's an issue with your send platform. | • Check with the source of your rep's list. If it's clean, make sure the tool your rep mass emails through is working properly. |

## 3. Prospect Engagement by Domain

This metric helps you coach your reps to focus their efforts on the accounts most likely to close.

This report breaks down outgoing calls and emails (x-axis) by the email opens, clicks, and replies (y-axis) these activities generate. Essentially, it shows you the viability of each prospect account, and points out where your rep should cut his or her losses.


*Here's what you need to look out for:*

| ENGAGEMENT METRIC | WHAT IT MEANS | YOUR TAKEAWAY |
|---|---|---|
| **High activity, low engagement** | Cut your losses; this isn't an account worth pursuing. | • Advise your rep to stop outreach.<br>• Discuss insight from any engagement had. |
| **High activity, high engagement** | This is an account to focus on. | • If high opens, low clicks — share email template with high clicks and replies.<br>• If high opens and clicks — have rep set up drip campaign.<br>• If high opens, clicks, and replies — ask why this opportunity hasn't closed. |
| **Low activity, high engagement** | This too is an account to focus on. | • If no reason for low activity, suggest increasing cadence. |

## COACHING ACCOUNT EXECUTIVES

When you sit down with your Account Executives, focus on pipeline management. It's the most important part of their day-to-day and one of your most effective coaching points — one that directly impacts their ability to consistently hit plan.

<table>
<tr><th>CONVERSATION TOPIC</th><th>METRICS TO FOCUS ON</th><th>QUESTIONS TO ASK THE AE</th><th>SUGGESTED DASHBOARD</th></tr>
<tr>
<td>What's happening with assigned accounts</td>
<td>
<ul><li># prospects won</li><li># prospects qualified</li><li># prospects in pursuing</li><li>Total $ amt won</li><li>% win rate</li></ul>
</td>
<td>
<ul><li>Any patterns with companies that are closing?</li><li>What objections are you hearing?</li><li>Why did we win accounts that closed since last week?</li><li>Is there anything that's holding you back that's out of your control but in our company's?</li></ul>
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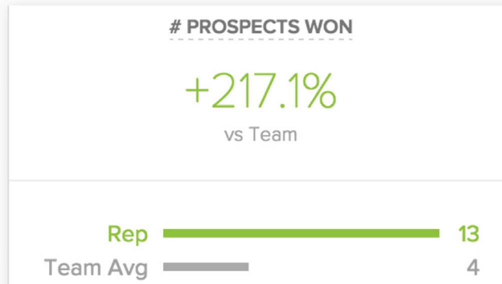

You'll want a dashboard that shows you current numbers vs. the rest of the team as well as % change from the week prior. This helps show you how this AE is performing in comparison to 1) fellow AEs, and 2) his or her own performance the week prior.
</td>
</tr>
<tr>
<td>Activity vs. Engagement for prospects pursuing:</td>
<td>
<ul><li># calls made</li><li># call connections</li><li># emails sent</li><li># emails replied to</li></ul>
</td>
<td>
<ul><li>Any updates with how your calls and emails have been going?</li><li>Any patterns behind engaged prospects (i.e. committed to buy in next 6 months)?</li><li>Can you think of any outside explanations for hot prospect dropping off in engagement? (i.e. on vacation, etc.)</li></ul>
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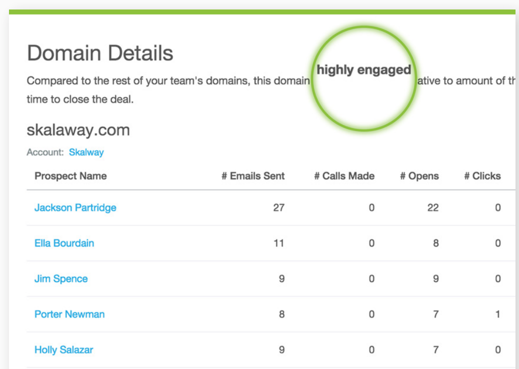

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<tr>
<td>Performance for quarter</td>
<td>
<ul><li>$ commit</li><li>$ quota</li><li>$ closed</li></ul>
</td>
<td>
<ul><li>How are you feeling about the quarter so far?</li></ul>
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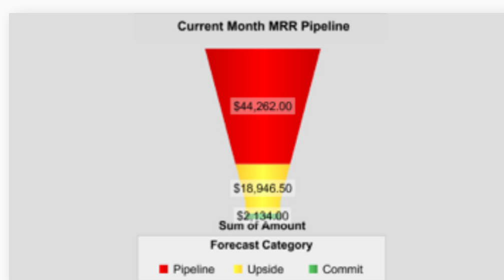

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***Note:*** *Make sure to jot down notes so you can maintain accountability for action items you promise to take.*

### Ask About Obstacles

What are they struggling with?

Good managers coach contributors to identify and address hurdles themselves so they sharpen their problem-solving and decision-making skills. According to Harvard Business Review, reps are more likely to overcome the problem on their own when they feel ownership over the solution.

To help a rep identify and overcome obstacles, ask them:

- **"Are you facing any obstacles today?"**
- **"How have you approached those up to now?"**
- **"How did that work?"**
- **"Is there a creative way to be successful, despite this obstacle?"**

Once the rep has identified the obstacle and a possible solution, offer any additional ideas you have. Then, make note of what was discussed so you can check in on progress during your next 1:1 with him or her.

## PART 3: MOTIVATE (5 MINUTES)

By this point in the meeting, the rep will likely have a solid list of next steps: emails to edit and prospects to call. You may be tempted to end the meeting there and let the rep start executing on everything discussed. Resist this urge. Before you part ways, dedicate 10 minutes on the bigger picture.

### Describe how efforts contribute to the goal.

Talk through each of your rep's type of activities and explain how they contribute to both the team's goals and the company's goals. This tactic was used by former Apple CEO, Steve Jobs, to ensure every member of the company knew exactly how their goals fit into Apple's vision.

When employees see the big picture, they're much more likely to feel motivated to go the extra mile. Leaders who emphasize the purpose and mission of the company inspire their team to exert more effort on daily activities.

### Make sure your team has a work-life balance.

Closing your 1:1s by asking your reps about their lives outside of work helps to assure you that they are not overly stressed with work, gives you another opportunity to find out about personal events that might affect their state of mind at work, and strengthens your relationship.

# TIPS FOR DELIVERING FEEDBACK

| DO: | DON'T: |
| --- | --- |
| **Acknowledge success.** When your reps exceed their goal, book a meeting, or overcome an obstacle with a prospect, take a moment to recognize it. Receiving positive feedback has an effect on the brain that increases work productivity. | **Postpone or cancel your 1:1s.** Consistency is key to keeping the trust alive with your team. When you skip a meeting, you show your rep that he or she is not a priority. Repeated offenses break down relationships and cause frustration. |
| **Ground your feedback in actionable data.** This helps explain the need for improvement and offer tangible next steps. Without it, underperformers are left spinning their wheels. | **Use judgmental language.** Avoid chastising language like "you shouldn't" and "you need to, and instead focus on more neutral and productive phrases like "I noticed," "What if," "I wonder." |
| **Touch base about your rep's personal goals.** The reps who are engaged, stay at the company, and work the hardest are the ones who you help improve. Investing time and resources into everyone's career development. It might seem like a little thing compared to quotas, but it's a big thing. | **Get defensive.** You should be asking "What else can I be doing for you right now?" and be receptive to feedback so your reps will continue to share it in the future. If you have a tendency to explain yourself, don't; let them talk. Part of being a good leader is adapting your style to connect. |
| **Be accountable.** Part of maintaining trust with your current team and growing trust with new members is to follow through with action items...If you say you'll do something, do it. | **Forget to listen.** Reviewing performance, to-do's, and strategies with your rep are only the half of it. By asking questions, you can coax out the broader story and get the "why." |

# BECOME YOUR REPS' BEST COACH (AND HELP THEM SELL SMARTER)

Yesware provides you with the data to make the best decisions, and your reps with the tools to save time and get more done.

Bottom line — focusing on what matters closes more deals.

## YESWARE FOR MANAGERS

- A prescriptive platform that gives you insights you can act on
- Metrics and reporting you need to coach at your best
- Dashboards that pinpoint the cause of high and low performance to help you strategize

TELL ME MORE

## YESWARE FOR YOUR TEAM

- Email tracking (including opens, clicks, and page-by-page view time on attachments)
- Time-saving tools like email templates, drip campaigns, and a CRM sidebar for inboxes
- Salesforce integration auto-syncs emails, meetings, and calls to Salesforce

SEND YOUR REPS OUR FREE TRIAL

Yesware