



Resource Library

One-to-One Meetings: Why Do Them and How to Do Them Effectively

If you are like many sales managers, you have dozens of people vying for your time each day. You have a boss that needs an updated forecast from you. You have customers calling you to talk about a product issue. You have reps that need your help on an upcoming presentation. These are all important, urgent concerns that require your immediate attention. So in the midst of all this, something has got to give. And one of the easiest things to move off your calendar is your regular one-to-one meetings with your reps.

You may figure that you already talked to your reps numerous times this week so there's no harm in skipping the meeting. You may rationalize that you're traveling with them soon so you can make up for not connecting with them now. You may have even received an email from them, saying that they're slammed and wondering if you guys can just talk next week. Sure, you think, no big deal. Well, you may want to reconsider because your scheduled one-to-one meetings with your reps are more important to them than either of you may have ever realized.

According to research from EcSELL Institute's Through the Eyes of the Rep survey that we have conducted with over 500 sales reps, there is a strong relationship between effective one-to-one meetings and increased rep motivation. Specifically, there is a statistically significant relationship between sales reps that "strongly agree" that their one-to-one meetings with the sales managers are beneficial and the sales reps that "strongly" agree their sales manager is effective at motivating them to greater sales performance. This strong relationship indicates the one-to-one meetings are a critical component of a manager's ability to motivate reps.

Furthermore, one-to-one meetings also have a strong impact on the reps' overall impression of their sales manager. Specifically, there is a statistically significant relationship between sales reps that "strongly agree" that their one-to-one meetings with the sales managers are beneficial and the sales reps that "strongly" agree their sales manager is an "excellent leader" and an "excellent coach." This relationship indicates that effective one-to-one meetings are one of the most critical activities in impacting overall management effectiveness as perceived by his or her reps.

Also, as illustrated in a different article in this month's newsletter, the importance of one-to-one meetings continues regardless of rep tenure. Indeed, effective one-to-one meetings are arguably even more important as reps become more seasoned. This is because coaching activities like helping reps build their product knowledge or selling skills isn't as necessary the longer the reps are in a role. But staying connected with them personally, discussing their progress against goals, and giving them an open forum to discuss needs, ideas and questions can help you stay more engaged with them.

In order to make the most of your one-to-one meeting times with all your reps, we encourage you to use a consistent format. You can make your one-to-ones much more efficient and still create a positive

impact if you know what you want to accomplish. EcSELL Institute has found that the following topics should be covered in a good one-to-one meeting:

- **Personal updates** – Letting your reps know you care about them as a person, not just a sales rep is important to establishing trust with them. Take five minutes at the beginning of your one-to-ones to talk about what's going on in their lives. Listen to what they did this weekend. Hear about their family. Ask about their hobbies. Just get to know them better.
- **Activity/goal/pipeline updates** – Discuss the performance data you have. Look for trends with them. Talk about areas where they are doing well. Talk about what can be improved. Staying on top of the execution of activities drives accountability, as well as ensures that you are dealing with any performance issues as proactively as possible.
- **Customer/prospect updates** – Many managers and reps spend nearly their entire one-to-one on this topic. While that is too one-dimensional, it certainly is important to talk through issues and opportunities regarding current and potential customers. When talking about customer/prospect issues, your main purpose should be to ask questions to help your reps learn how to diagnose and solve these issues on their own.
- **Questions/where they need your help** – This last category is basically an open-ended discussion. Give your reps the opportunity to ask questions about anything that's been weighing on their mind. And be sure to ask them how you can help them in their work. Creating an open forum encourages them to feel comfortable discussing needs and issues with you and works to strengthen the trust and partnership between you.

In addition to using an effective format, it is also important to conduct one-to-one meetings consistently to receive the benefit from them. Many of our EcSELL Institute members have found that the easiest way to ensure consistency of one-to-one meetings is to put them on calendars as a recurring event. This allows reps and their manager to plan around one-to-ones and, most importantly, not to let several weeks go by without putting a meeting on the calendar.

In conclusion, one-to-one meetings can be a highly effective activity that impacts rep motivation and their overall impression of their coaching relationship with you. By making some tweaks in how you conduct your one-to-one meetings, you can increase this effectiveness. Try using the above format with your reps in your upcoming one-to-one meetings and see if you are able to create a better dialogue that ultimately leads to better results.

About The Author



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With over 12 years of experience in employee assessment, leadership coaching, and customer service, Sarah has helped hundreds of executives develop professionally and assist them with implementing programs directed toward increasing sales results and profitability.



EcSell Institute provides strategies for continuous improvement by showing our members how to apply the latest research, technology, and best practices in leadership and sales coaching, and by involving them in a network of the top sales management minds. Why? Because we know that improving a sales manager's ability to coach and lead has the biggest impact on sales team results.

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