Lead For Success
By Creating a Powerful Coaching Culture

Joe Micallef – Sales Strategist & Coach
May 2 – IBA MEGA Conference
Winning Team

Perfect Alignment of Strategy & Culture
WINNING TEAM

- Greater engagement
- Highly skilled
- Consistent beliefs & behaviors
- Low team turnover
- Better strategic commitment
- Agile competitive responses
Lead For Success

By Creating a Powerful Coaching Culture

1. Why Culture Is Important
2. Create a GREAT Growth Strategy
3. Coaching for Success
What is Culture?
“The Way We Do Things”
- Edgar Schein -
Signs of a Non-Winning Culture

- Managed not Lead
- Minimal formal coaching
- Uninspiring team meetings
- Little strategic collaboration
- “Sales autonomy”
Consequences of a Non-Winning Culture

- Poor staff engagement
- Minimal skill development
- Complacency
- High staff turnover
- Poor strategic execution
- Market reaction slow
81% of executives agreed that a company without a winning culture is doomed to mediocrity

- Bain & Company -
CULTURE eats strategy for breakfast

- Peter Drucker -
Leadership & Environment motivate excellence
Three Keys to Excellence

- **AGREE** on Activity
- **COACH** Activity
- **REVIEW** Activity
<table>
<thead>
<tr>
<th>GREAT</th>
<th>GATHER</th>
<th>Gather your team for a collaborative planning session.</th>
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<td></td>
<td>EFLECT</td>
<td>Reflect on your SWOT and past performances.</td>
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<td>XPLORE</td>
<td>Explore your WHAT, HOW &amp; WHY.</td>
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<td>GREE</td>
<td>Agree on activities and challenge limiting beliefs.</td>
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<td>TAKE ACTION</td>
<td>Execute the strategy and implement review process.</td>
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Growth Strategy: Your Bank’s DNA
Growth Strategy: Your Bank’s DNA

DIFFERENTIATION

ACTIVITIES

NUMBERS
Aligning the What, How & Why
Determining your Growth Strategy

WHAT

HOW

WHY
• WHAT strengths will you leverage?
• WHAT opportunities will you target?
• WHAT do you want your Bank to be?
• HOW do you engage targets?
• HOW will you persuade targets?
• HOW will you retain your customer base?
• Explore as many “Hows” as possible
• Be specific about best practice
Lead for Success: Business Development Essentials

- Confidence & Motivation
- Retention & Advocacy
- Targeting
- Compelling Story
- Proposing
- Engaging
- Activity Plan
• WHY = MOTIVATION + CONFIDENCE
• WHY have you chosen the WHAT & HOW?
• WHY is this strategy important for the Bank …… and your staff
• Make the WHY personal
Aligning the What, How & Why
Determining your Growth Strategy

• Our goal is for the Bank to be ......
• We will achieve this by ......
• This is important to me because ......
Three Keys to Excellence

✔ AGREE on Activity
☐ COACH Activity
☐ REVIEW Activity
Coaching for Success
Inspiring Leaders To Coach

Your “True North” …

How do you improve team performance?
{Good Consistent Coaching}

“Things don’t change. People change”
Thoreau

How do you know if your coaching is working?
{Robust Culture}
Leaders - Good Consistent Coaching

- Coach Behaviors, Skills & Beliefs
- Challenge Status Quo
- Observe Requested Behavior(s)
Coaching for Success
Inspiring Leaders To Coach

Team – Robust Culture

✧ Engage in Sales Conversations
✧ Sharpen and Grow Skills
✧ Experience the Skills Trained
Coaching for Success: Building Confidence
Coaching for Success: Building Confidence

Confidence

Expectations

Beliefs

Results

Action Behavior
Coaching for Success
Inspiring Leaders To Coach

Create a Coaching Cadence

• Annual Conference
• Weekly Team Meetings
• Bi-Weekly Team Coaching
• Monthly 1x1 PLAN Meeting
• Joint Customer Meetings
Coaching for Success
Inspiring Leaders To Coach

1. Training
2. Discussion
3. Practice
Coaching for Success
Inspiring Leaders To Coach

Team Coaching Planner

• Specific Skill & Research
• Best Practices Discussion
• Assign Field Exercise
• Share Notes - Playbook
• Provide Feedback
Team Coaching Exercise

• Choose an Activity
• Write down 3 Great Examples
• Write 3 Questions you can ask your Team
• Consider 1 Field Exercise
The Adaptable Coach

ENABLER

ENERGIZER

AGITATOR

ENFORCER
Three Keys to Excellence

✓ AGREE on Activity
✓ COACH Activity
☐ REVIEW Activity
Lead for Success:
The Activity PLAN
## The Activity PLAN

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Three Keys to Excellence

 ✓ AGREE on Activity
 ✓ COACH Activity
 ✓ REVIEW Activity
Winning Team

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Next Steps

1. Host a GREAT Strategy Meeting
2. Introduce a Coaching Program
3. Formally agree on a PLAN

growUP
Growth Strategies • Uplifting Cultures
Lead For Success

By Creating a Powerful Coaching Culture

Contact Joe Micallef

joe@growupsales.com
773 329 0066