

Five Steps to Leading in a Tech Driven World



Manager's Guide to Coaching with AI



The Sales Manager's Guide to Coaching with AI: Five Steps to Lead in a Tech-Driven World

Introduction: The Shift Is Here

AI and CRM technologies are transforming how sales teams operate. Automated call recording, performance scoring, and content recommendations are now standard features. But with all this tech, one thing remains clear:

- People don't change because of data. They change because of belief.
- Managers are still the difference-makers. While tools can track behavior, only a good coach can shape it.

What AI Can (and Can't) Do in Sales

AI and CRM tools are changing the sales landscape by increasing visibility, automating insights, and helping teams move faster. These platforms can record sales calls, analyze conversations for tone and keywords, and even simulate practice through avatar-based objection handling. They help identify trends, flag key coaching moments, and recommend actions that save time and improve consistency.

But despite their power, they have limits. AI can't understand context, build trust, or motivate someone to act. It can't replace a manager's ability to interpret nuance, adapt to team dynamics, or influence belief and behavior. CRM dashboards are great for tracking activity, but they can't coach a rep through fear, doubt, or a lack of confidence.

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This is where human leadership still matters most. AI is a powerful assistant, not a substitute. Coaching is still the bridge between information and execution.

AI and CRM platforms can:

- Record and analyze sales calls
- Provide conversation insights (talk ratio, sentiment, keywords)
- Recommend the next steps for the next call
- Simulate objection handling with avatars
- Record rep practice sessions and provide feedback
- Surface coachable moments

AI and CRM platforms can't:

- Build trust with your reps
- Interpret team dynamics
- Address belief barriers
- Develop potential or shift mindsets

Bottom line: AI helps scale insight and efficiency. It doesn't replace human coaching.

Quick Self-Assessment – Are You Leading or Relying on the System?

Ask yourself:

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- Am I a desk-jockey manager
- Do I know how to use the technology and coach me time how to leverage it?
- Do I rely too heavily on dashboards instead of direct feedback?
- Do I spend time in the field to observe what is happening with customers
- Do I see representatives execute based on technology
- When was the last time I asked a rep what they believe is holding them back?
- Am I coaching the person or managing the metrics?
- Do my 1:1s include both performance and mindset conversations?
- Do I know our top customers?
- Do I leverage technology to make myself a better coach?

Score yourself:

- Mostly Yes: You're likely leaning too hard on the system.
- Mostly No: You're focused on real coaching.

The Coaching Gap Most Leaders Miss

Even with AI, most reps don't struggle because of a lack of knowledge. They struggle because of mindset gaps:

- Lack of confidence in new messaging
- Fear of rejection or failure
- Misaligned beliefs about their territory or accounts

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But one of the most overlooked blockers is value misalignment—when a rep’s internal beliefs conflict with the behaviors expected for high performance. For example, a rep who avoids closing may have a deep discomfort with asking others for things, especially if it feels pushy or transactional. Others may hesitate to challenge authority figures, like physicians, because of how they were raised or previous career norms. These beliefs are often unconscious, and they limit performance no matter how clear the playbook is.

One way to uncover these barriers is by checking for value congruency. Ask: Does the rep believe the actions they’re being asked to take align with who they are and what they value? If there’s a disconnect—like a fear of being perceived as pushy, or discomfort challenging authority figures like doctors—it will show up in hesitation, avoidance, or low follow-through.

To help guide this conversation, apply the 4 A’s Coaching Framework:

1. Analyze – What do you see in the rep’s behavior, metrics, or feedback that signals an issue?
2. Anchor – Set the tone, reinforce trust, and frame the conversation with a clear, mutual agenda and purpose.
3. Agree – Collaboratively identify the core challenge and confirm mutual understanding.
4. Action – Define the next steps that address the real issue and reinforce forward progress.

Great managers don’t just coach behavior. They coach belief and values.

4. Five Coaching Moves That Work in an AI-Enabled World

1. Ask Belief-Based Questions

“What makes you hesitant to try that approach?”

“What would success in this territory look like to you?”

2. Pair Tech Insights with Human Feedback

Use AI tools to flag trends, then discuss the context in your 1:1s and work sessions. Share your specific observed feedback and the impact of those observed behaviors on customer interactions and results.

3. Use Roleplay Avatars as a Starting Point

Let reps practice objections and sales calls with tech, then debrief and learn together. Take the opportunity to level up your coaching skills using technology. Do you agree with the feedback? Did you miss something?

4. Shift from Telling to Coaching and Teaching

Don't just share best practices; help reps discover what works for them. Your role is to help them to be the best version of themselves. Don't do all of the heavy lifting.

5. Coach the Whole Rep

Talk about mindset, confidence, and belief, not just numbers. Zig Ziglar would say selling is a transference of emotion. Sometimes that the only difference between a rep that's doing well and one that isn't

5. Tech + Coaching = Performance

You don't have to choose between AI and good management. The best leaders use both. Leverage every tool you have in the bag to drive performance. Your EQ is needed more than ever.

- Let AI surface the data.
- Let managers drive the change.

When your tools and coaching are aligned, execution improves. When belief is built, reps perform.

Final Word

AI can guide, support, and accelerate—but it can't inspire. That's your job. The future belongs to coaches, not just data analysts.

Bonus Checklist: Aligning Tech, Coaching, and Performance

- Review CRM insights weekly, but tie them to coaching themes
- Use avatar-based practice 1x/month in team meetings
- Schedule mindset check-ins every quarter
- Track both hard metrics (KPIs) and soft metrics (confidence, belief)
- Reinforce positive behavior and mindset shifts

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The 4 A's of Coaching

To further enhance your coaching effectiveness, incorporate the 4 A's framework:

1. Analyze – Based on the data, your observations, and knowledge, what are the issues that need to be addressed?
2. Anchor– Establish trust, set direction, and confirm the agenda.
3. Agree – Create buy-in and agree on the real issues. Confirm shared understanding
4. Action – Move forward towards goals and next steps if you both agree on the issues.