



The 2017 Guide to Improving Your Field Force Coaching Process



WHITE PAPER

Atomus (The Americas)
1003 High House Road
Cary, NC 27513
t: 919-584-8338
e: inquiries@atomus.com

www.acoach.net

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Entering 2017 - How things have changed

Although financial experts are forecasting positive trends for 2017, it's hard to find anybody who would argue that in today's economy we need to generate more from less. Our sales teams are faced with:

- Less physician face-to-face time
- Older products
- Fewer new 'blockbuster' brands
- Increasing competition – both generic and branded
- Managed care and market access challenges
- Less 'new' clinical data being provided by their companies
- Customers' increasing use of digital media to source product information

The media and our colleagues are constantly reminding us of significant pharmaceutical sales force reductions — with realistic estimates circulating that the western sales field force is between 30% and 50% smaller than a decade ago.



It follows that physician interactions in 2017 are harder to come by and therefore exponentially more valuable than they have ever been. That means that when our sales professionals enter into those interactions they need to be more highly trained, more confident and more knowledgeable... and that means coached more effectively than ever before.

It's that 80/20 rule again

Consider the widely accepted axiom that 20% of your salespeople are bringing in 80% of your sales. Conversely that means 80% of your sales people are bringing in only 20% of your sales.

One thing we do know is that it will be harder but not impossible to affect the way that your top 20% are already performing. But that's not our main concern. We want to take the underperforming 80% and make sure we are optimizing their performance and leveraging each and every customer opportunity.

Training and development goes hand in hand with coaching and if you want the training to take root and become part of a person's everyday work life, then it's pretty pointless doing one without the other. Sales representatives learn in sound bites and through repetition. Unfortunately, a couple of days training in the classroom, costly as it may be, is not enough time for behavioral change to stick – which is where field coaching and pull through by the first line sales managers take over.

As Malcolm Gladwell stated in Outliers, it takes a long time (he quotes 10,000 hours or 10,000 experiences) to become an expert at something! Our representatives need the support, guidance and coaching from their managers until they have mastered the skill they are

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working on, and managers need to practice coaching until they have perfected their skill. Managers will need the tools and encouragement to succeed as their mind is often spinning with all of the additional tasks a manager has to focus on and do!

And, just like any skill learned in life, for some, coaching is like being a duck in water and for others, they need to build a raft first.

Now more than ever, when something is wrong before, during or after valuable physician interactions, we absolutely need to observe it, explain it, and coach to it to improve the situation.

Removing Coaching Invisibility - Seeing is Believing

In order to maximize the impact of our sales teams, we need to ensure that they are not only motivated but are inspired to perform at the top of their game. The best representatives are totally focused on the job “in hand” and know exactly what is expected from them and what actions they need to carry out to ensure that they are set for success – consistently.



In an ideal situation, with an inspiring and highly competent first line manager as coach, our representatives would be given this level of insight, support, coaching and encouragement on every field ride and progress steadily towards clearly-defined targets. Unfortunately, our customers inform us that these managers are few and far between. If, at a rough guesstimate, we say that only 10% of managers are currently coaching the way you, as an organization would ideally like them to coach, then that means 90% of the sales team are not receiving effective coaching!

The situation is exacerbated when coaching time is mandated but not adequately supported. For example, many organizations set an expectation for managers to spend 60% of their time in the field on field rides with their team. Based on respected research from the Sales Executive Council, this is the optimum percentage of time for field-based sales teams. Yet, despite the significant potential sales increases and positive impact of highly skilled and developed sales people on customers and on their own career advancement, sales managers have very few tools to support their coaching. Most support tools only have rudimentary methods to extract top line and basic data, if any. With the coaching activity and interactions being invisible, understanding what is really happening in the field is a near impossible and costly task.

Example:

- Lets take a midsize sales team of 150 employees
- Take an average sales manager's salary of approx. \$150k.
- Multiply this by the 15 managers and then
- Multiply by 60% field coaching time.

\$150,000 x 15 managers = \$2,250,000
 x 60% field coaching time
 = \$1,350,000.00 worth of “invisible coaching” (not including representative time / cost)

That's a staggering \$1.3 million of invisible and largely untracked coaching time spent in the field that should have been reviewed, evaluated and nurtured.

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Improvement - It is not as hard as you may imagine

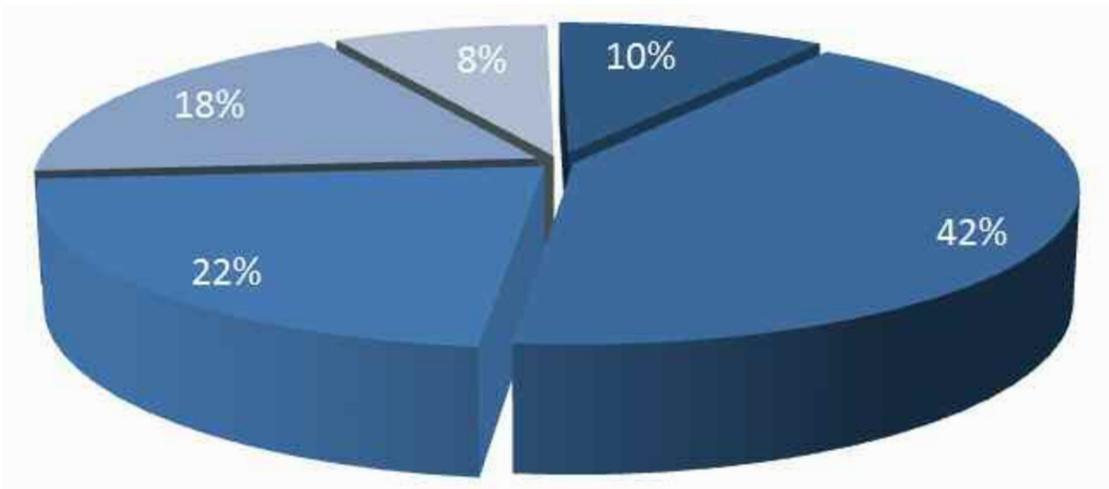
You understand the issues and know you need to raise the bar on coaching but where do you start?

You may be pleased to hear that what we normally advise our clients is that the best place to start is with what you already have. Normally that 'something' provides a base that can be built upon and enhanced.

It's important to take a step back and review where you are. You will likely to fall into one of four camps for the differing ways that organizations currently capture their field coaching interactions:

1. Verbal coaching occurs with occasional e-mail reminders and follow up
2. Paper or word-based coaching reports collated on an ad-hoc or organized basis for review by 'someone'
3. Internal IT add-on to a current CRM system or 'in-house' built tool
4. Bespoke proprietary coaching tool customized specifically to track and monitor coaching metrics per field force. In addition, aligns to and pulls through all competencies, coaching model, and training assets

During a recent survey we conducted, we found the breakdown amongst attendees to be in the following mix:



SURVEY GRAPH

1. Verbal with occasional e-mail reminders - 10%
2. Paper or word-based coaching reports - 42%
3. Electronic bolt-on or in-house built system - 22%
4. Bespoke proprietary coaching tool customized specifically to track and monitor coaching metrics per organization - 18%
5. Opted out - 8%

In summary, 74% of coaching from our sample audience was captured in a less than ideal format. The big question is how to turn this around?

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10 Key Steps to Improve Your Field Coaching Effectiveness

Below you will find a ten-step Guide to Improving Your Field Coaching Effectiveness. Some of the points you may already have implemented in your organization, some you may not have. The intention is to continue to highlight the best- practice examples of how to make coaching truly live and breathe in your organization.

STEP 1 Defining the Skills & Competencies for a Successful Representative

You will need a consistent way of ascertaining WHAT it is your managers need to coach the representative on, normally consisting of a pre-defined number of competencies, skills and behaviors that outline clearly what is needed from a high performing representative in your organization.

Often this will be comprised partly or fully from your sales model if you have one. You may decide to amalgamate business, selling, communication or interpersonal skills for instance; what is most important is that the organization has agreed that, without excelling in these core skills, the sales person is unlikely to become a high achiever. Core skills should be easy to find, most HR departments already use them along with others that normally make up the annual performance review plan.

STEP 2 Introducing a Consistent Rating Method

Of equal importance to the competencies (both functional and technical) is the addition of a clear rating scale. This scale should permit the ability to describe (ideally with reference to a detailed informational rubric) exactly what each of the rating levels actually looks like in a way that makes it simple for both the manager and the representative to agree on what good looks like for that competency or skill and where they are on the scale. This rich discussion is critical in determining the specific skill or behavior that should be coached to elicit the greatest ROI. It also clarifies to the representative the crucial WHY in the coaching conversation.

The scale should also allow entry of free text comments for the manager to accurately describe and validate the observations that led to the rating attributed. An agreed-upon rating scale with distinct and detailed examples of each level of the behavior goes a long way towards making the assessment and subsequent coaching of a skill clear for both the representative and the manager.

STEP 3 The Ability to Assess the Manager's and Representative's Progress

A pre-coaching self-assessment for the representative can be a very powerful part of the coaching process, ensuring both representative and manager are completely aligned on current performance, perceptions, expectations and coaching focus, before, during and after the field ride.

This valuable, self-assessment gives the representative an opportunity to evaluate their own performance before a field ride, ideally for discussion in the pre-ride meeting.

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STEP 4 Applying a Standard Coaching Method or Model

A coaching model is there to give consistency in coaching across the organization and most importantly to help the coach work methodically and clearly through pre-defined steps to ensure that the representative not only understands what needs doing and how, but also what they were not doing and the possible reasons why.

There are many flavors of coaching models - GROW and STEER to name just a couple, you will find many examples with a quick web search. Most are proprietary so you may need to pay to use them if you don't already own one.



You would be amazed at how such a simple addition to everyday management changes a person, team and culture....for the better!

STEP 5 The Coaching Plan

There needs to be an easily-accessible and constantly referred to Coaching Plan. The plan should align directly to the skills and competencies required to be successful.

Ideally a coaching plan should have a maximum of three skills or objectives to be coached, each with clear action steps (SMART) assigned.

Both managers and representatives must be able to access the plan easily, remotely and ideally 'off-line', so that constant adjustments and additions can be made to the coaching plan and it becomes a living document.

STEP 6 Making Coaching Part of Management Behavior

Aside from competencies and skills, a manager needs to log additional relevant points for the representative: current sales results, marketing strategies and local execution, and other to do's that ultimately support technical and functional competencies. By creating a centralized repository where previously disparate pieces of information are now accessible all in one place, the manager can build the history of the representative more clearly and create a sound and forward-looking plan that challenges the representative positively.

STEP 7 Representative Buy-In

Both the manager and the representative should be held accountable for the content of a coaching plan. Specifically, the manager for the coaching of the representative and the representative for the completion of the actions and tasks that are assigned through mutual discussion. Accounting comes easily, once both the manager and the representative get into the habit of asking for the detail on what they have done, what happened as a result and what should be done differently. You would be amazed at how such a simple addition to everyday management changes a person, team and culture... for the better!

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STEP 8 Support Materials

Support of the managers is key. Access to training materials and solutions that address each of the key skills that you are asking the manager to coach should be as easy as clicking a button! Nothing is more frustrating and demotivating for your manager than coaching to or rolling out programs with out-dated, partial or non-existent training material to back them up.

STEP 9 Uptake and Success Measurement

This is without doubt the most important part, where the effort that goes into making steps 1 - 8 happen really pays off.

KPI reporting enables us to piece together the true picture of the team's skills and field coaching activity. What is working, and not working, where there are areas of excellence and where there are areas that need our attention.

Being able to access that information instantly – at every level of the company is critical. How easily you can get at those metrics will be down to your current mechanism for capturing coaching that we discussed earlier.

Some examples of qualitative and quantitative reports are below. The actual KPIs you put in place can be varied and weighted to suit your organizational coaching culture and targets. We offer our clients a choice of over 70 powerful out-of-the-box metrics in addition to bespoke ones but here are some examples of the most popular.

Example Quantitative KPI's

Fundamentals	Intermediate	Advanced
Days in field	Progression over time	Time between field ride and feedback / actions creation
Who is being coached and when	What coaching actions and tasks have the greatest effect	What training is sticking and what is not
Trends and recurring weaknesses	Field ride durations	Rep feedback on how their coaching feels

As well as measuring quantitative KPI's you should run a regular audit of all coaching reports to check on the quality by evaluating criteria from the examples below.

Example Qualitative KPI's

Ratings	Goals	Actions
Consistent with rubrics	Achievable	Clear
Comments at extremes	Non-target-related	Time-bound where possible
Fluidity	Success defined	Commented on and monitored

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STEP 10 Selecting the Right Tool for the Job

Objectively reviewing a coaching process can be tough. If you are looking to really improve your sales force effectiveness, the benefit of Steps 1-9 can only be harvested if you are able to view, easily, what is really currently happening and why – real time.

We urge our clients to step back and take a fresh look. Often many of the processes you already have are excellent and firmly place you on the road to success. The majority of the changes needed revolve around bringing all the disparate elements together and demonstrating to both manager and representatives how easy and valuable coaching can and should be.

Whatever tool you select must be easy enough for managers and representatives to adopt but intelligent enough to display the necessary metrics and KPIs simply, meaningfully and on demand. With this powerful information in place, you are in an informed position to steer your people and their teams in the right direction.

If you are using a paper-based coaching process, you may want to consider an electronic solution that at a minimum allows you to easily capture and compare the data from the field. If you are already using an electronic method but you feel it is out-of-date, lacks essential features or is not flexible enough, consider the six following must-have features. These features will ensure your system provides the power, usability and scalability for you to launch or re-invigorate your field force coaching program:

- i. Ability to customize to your sales model, processes and needs
- ii. Assessment capability for skills gap analysis, both Self and Manager
- iii. Ease of use for both data entry from the field and review from senior leadership
- iv. Technology
 - a. Evaluate current SaaS options for maximum flexibility and minimal internal IT resource drain
 - b. OFF-LINE functionality - for areas of bad coverage, use on flights etc
- v. Partnership with a vendor who has a proven and active business team, who understands pharma field coaching issues and can proactively offer a future road map of improved features and functionality
- vi. Ensure measuring and reporting functions are suitable for multiple users at multiple levels, visibility, accountability and measurement of activity, time and progress, as well as overall quality and adherence to your model, are keys to your success

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About the Author:

Simon Mormen, Founder and President of Atomus

Overseeing offices in both the US and UK, Simon is recognised as a leading expert in Field Force Coaching and Cloud to mobile business application development and has over 20 years experience of implementing solutions for global corporations.

Simon works with Pharmaceutical, Biotech, Media, Technology, and Financial organizations and partners with leading authorities on Sales Coaching Models, Sales Training and Field Force Effectiveness. Simon has helped shape the sales and coaching strategy of major corporations and enabled organizations to manage the processes and programs which drive field force selection, promotion and advancement.

Further Resources

Additional articles and white papers are available at www.acoach.net, including:

White Paper – “9 Metrics for Measuring Sales Force Effectiveness”

White Paper – “What It Takes to Turn Managers into Coaches”

About Atomus

Atomus create software and mobile applications for businesses on the move. Atomus harness the power of “Cloud Technology” for their clients and use their unique in-house development skills to create and deliver business changing software. Atomus work with leading Pharmaceutical, Biotech, Media and Financial Organizations.

The “a:coach” field force coaching tool has been developed by Atomus over 10 years with input from leading experts and demanding global companies who understand the need to focus on improving customer interactions, deliver “on-brand” behaviors and enhance retention and pull through across their teams. a:coach is a powerful tool to launch, grow or re-invigorate a coaching culture.

Find out more about a:coach at www.acoach.net

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t: 919-584-8338
e: inquiries@atomus.com

Atomus (EMEA)
The Granary, 1 Waverley Lane
Farnham, GU9 8BB, UK
t: +44 (0)1252 713002
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