10 step guide

to Improve Global Field Coaching Effectiveness

by Simon Mormen

acoach
connect • align • transform

Make coaching truly live and breathe in your global organization

As we are all well aware, the "World Market" has become a reality in the last ten years. As a result, effectively managing and improving your Field Coaching effectiveness at a GLOBAL level is the key to significant organizational success.

Effecting change only within one business franchise or country is no longer enough. It is critical to look at your field force from a Global level to assess gaps and apply coaching best practices across the entire organization.

To that end, enclosed is our ten-step starter Guide to Improving Your Global Field Coaching Effectiveness.

You may have already implemented a few of these points in your organization. The intention is to continue to highlight the best-practice examples of how to make coaching truly live and breathe in your global organization to achieve the best overall results.

10 Step Guide
to Improve Global Field Coaching Effectiveness

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.

This means you will have to construct a set of Selling Competencies or Sales Model, then share and obtain buy-in and input from all markets that you hope to use it (at this point you may also want to consider a Coaching Model if you don't have one – see Step 4 below). 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. We would recommend that you stay away from numbers and replace with more meaningful words such as Developing, Satisfactory, Role Model, etc. This enables a rich discussion that 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 has proven to 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, leading to greater clarity, understanding and alignment and a much more productive Coaching Conversation.

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 predefined 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 not.

There are many flavors of coaching models - GROW and 4S 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.

Step 5: The Coaching Plan

There needs to be an easily-accessible living and breathing 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 to enable focus and avoid rep overload, 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!

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 outdated, 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 you to piece together the true picture of the team's skills and field coaching activity and make country-on-country comparisons. 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 organization 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 customized ones, but here are some examples of the most popular.

Example Quantitive 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 quantative 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

10 Step Guide
to Improve Global Field Coaching Effectiveness

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 scalable, translatable and adhere to global data privacy regulations (GDPR for instance). It should also be easy enough for managers and representatives to adopt, but intelligent enough to display the necessary metrics and KPIs simply, meaningfully and on demand. You will also need a "training-in-a-box" package that is easy for countries to translate and train their teams. Remember the whole world does not speak English, especially at Rep level. 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 need to change to 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 seven 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. OFFLINE 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 Life Science 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
vii. Choose a system that will technically support a Global deployment with built in translation ability and ability to configure for small country specific nuances. (We have yet to see one Coaching Report that exactly matches requirements across the world without minor tweaks!)

If you need further help selecting a Global Field Coaching system to track, manage and report on all Field Coaching activity in one place, please call Atomus at:

919-584-8338.

We are experts in this field and ready to help you achieve success!