

Field Visits and Coaching Workshop Part 1

Course Content Outline

Learning Objectives

- Compare and contrast the coaching strategies and field visit tactics that distinguish average coaches from effective coaches
- Use observation skills to accurately analyze calls
- Practice delivering effective coaching messages based on observations
- Create an action/planning template for use with representatives in the district

Pre-Workshop Activity

Self-assessment quiz
Rank areas of relative strengths
and weaknesses

To be completed individually prior to the workshop

Print-based using participant guide

- Rank areas of strength/weakness for coaching strategies he/she currently uses (list of options based on [4?] characteristics associated with effective coaching)
- Write how many days a week he/she spends in the field
- List the tactics he/she currently uses for field visits

Overview

- Most important responsibilities for DMs
 - Developing representatives
 - Using field visits as coaching tool
- Effective DMs are better coaches and achieve better sales results
 - Coaching-centric job description
 - Four days per week in field
 - Interactions with each representative

Coaching Strategies:

• *Average coaches:*

- Use the same coaching approach for all representatives
- Dictate representative development, objectives and plans

• *Effective coaches:*

- Tailor coaching approach for each representative
- Expect representatives to own their development
- Teach representatives to assess their own calls

Field Visit Tactics

• *Average coaches:*

- Spend the same amount of field time with each representative
- Expect all representatives to use a standard selling style
- Provide feedback on a call-by-call basis

• *Effective coaches:*

- Allocate field time based on representative needs
- Encourage representatives to discover and use their own selling style
- Observe multiple calls to determine patterns of behavior

Group Discussion

Polling participants – What behaviors are attributed to **average** coaches?

Group discussion; facilitator list responses on flip chart

Facilitator provides structured, guiding questions to elicit responses which will be compared/contrasted to responses about effective coaches

A blank table will be included in participant guide so that participants can create a list to take home

Suggested guiding questions:

- Do average coaches use the same coaching approach or different approaches for all of their representatives?
 - Answer: Average coaches use the same coaching approach for all representatives.
- How do average coaches handle their representatives' development objectives and plans?
 - Answer: Average coaches dictate representative development objectives and plans.
- How do average coaches divide the amount of time they spend with each of their representatives?
 - Answer: Average coaches spend the same amount of field time with each representative.
- What expectations do average coaches have with regard to their representatives' selling styles?

Group Discussion

Polling participants – What behaviors are attributed to **effective** coaches?

Group discussion; facilitator list responses on flip chart

Facilitator provides structured, guiding questions to elicit responses which will be compared/contrasted to responses about average coaches

A blank table will be included in participant guide so that participants can create a list to take home

Suggested guiding questions:

- Do effective coaches use the same coaching approach or different approaches for all of their representatives?

- Answer: Effective coaches tailor their coaching approach for each representative.

- How do effective coaches handle their representatives' development objectives and plans?

- Answer: Effective coaches expect their representatives to own their development.

- What strategy do effective coaches employ for assessing their representatives' calls?

- Answer: Effective coaches teach representatives to assess their own calls.

- How do effective coaches divide the amount of time they spend with each of their representatives?

- Answer: Effective coaches allocate field time based on representative

Practices for Field Visit & Coaching Success

- Effective coaches consistently used three practices:
 - Adopt a coaching-centric personal job description
 - Spend four days a week in the field
 - Use effective coaching strategies

View of District Manager Job

- Average coaches
 - Representative monitors
- Effective coaches
 - Have a coaching-centric view of their job
 - Top priority = representative development
 - Representative developers

Visual - Figure 2

Effective coaches have a coaching-centric view of their job.

These DMS set rep. development as their top priority.

Highly effective managers are “rep. developers” rather than “rep. monitors”.

Need more detailed info on “developers” and “monitors” – from HSG’s Improving District Manager Effectiveness report??

Effective Coaching Field Visits

- Spend more time on field visits
 - Spend 4 days a week in the field
 - 115 hours each month in field = 7.2% higher sales results
 - 173 eight-hour days on field visits each year
- Premium on face-to-face time

Visual – Figure 3

Effective coaches spend more time than average coaches on field visits.

Coaches who spend more than 115 hours each month conducting field visits generate sales results 7.2 % higher than those of other coaches.

Effective coaches spend the equivalent of 173 8-hour days on field visits each year, equaling 4 field days a week.

Effective coaches place a premium on face-to-face time.

Sacrifice personal time.

Conduct more 2-day visits.

Make up for missed coaching time.

Give undivided attention to reps once in field.

Average Coaching – Field Visits

- Less than 15% of DMs spend four days a week in the field
- Have competing priorities

Group Discussion

What distractions take DMs' time away from coaching?

How can DMs increase field visit time?

Group discussion led by facilitator with large wall charts of the best practices and a blown up version of the district plan template (*waiting on district plan template from Genentech*)

A blank table will be included in participant guide so that participants can create a list to take home

Suggested guiding questions:

- What distractions take DMs' time away from coaching?
 - Possible answers:
 - Time-consuming management and reporting systems
 - Meetings
 - Filtering communications
 - Travel time
- What can DMs do to increase field visit time?
 - Possible answers:
 - Sacrifice personal time to spend more time in the field
 - Conduct more two-day visits to cut down on travel time
 - Conduct administrative tasks at night and on weekends
 - Get trained in the efficient use of management tools and reports

Effective Coaching Strategies

- Individualize Objectives and Approaches
- Observation
- Representative Self-Assessment
- Accessibility

Visual – Table 3 – Effective Coaching Strategies

Individualize: Effective coaches tailor their coaching style to each rep. They spend more time with new reps. To learn their selling and learning styles.

Observation: Effective coaches identify reps' development needs through observed patterns of behavior rather than a preset checklist of tactics. During field visits, effective coaches observe three or four calls before assessing development needs, while average coaches provide feedback on a call-by-call basis.

Rep Self-assessment: Effective coaches teach reps to assess their own call performance. This process begins with joint assessments of calls that the DM observes.

Accessibility: "I'm available" approach with reps between field visits. Begin with open-ended question, focus on rep's needs. Outside of field visits, spend time talking on phone during travel time, lunch or breakfast meetings, business planning and training sessions. Average coaches set agenda for each conversation, making reps feel like they're being checked up on.

Field Visit Coaching Tactics

- Average vs. Effective coaches in the field

Visual - Table 4

Increasing Effectiveness

- Only 1 in 7 DMs is an effective coach
 - Competing priorities keep DMs from spending time developing coaching skills
 - Many DMs have been trained to use a standard approach when coaching all representatives
 - Many DMs struggle to make the transition from representative to manager

These barriers keep DMs from becoming effective coaches

Management development, DMs, and RMs all play a role in overcoming these barriers.

Skills for Effective Coaching Strategies

4 coaching strategies and related skills table

Visual – Table 5

Re-cap

- Top priority = representative development
- Four days a week in field
- Individualized objectives and approaches to coaching
- Representative self-assessment
- Coaching-centric personal job description
- Observation
- Accessibility

- Set representative development as top priority
- Spend four days a week in the field
- Individualize objectives and approaches to coaching
- Teach representatives to self-assess
- Adopt a coaching centric personal job description
- Observe representatives in the field
- Remain accessible to representatives between field visits

Activities after content presentation

- Self-assessment quiz (review of answers completed prior to workshop)
- Review example job description to be revised to be coaching-centric
- Analyzing average & effective uses of field reports as coaching tool
- Observe role-play (or video) of sales call and analyze approach to coaching
- Role play coaching discussion with peers and provide feedback
- Create Action Plan

Ideally will have real district plan from Genentech

Activity

Self-assessment quiz: Review of answers completed prior to workshop

After completion of content delivery, students will review the answers they gave to the self-assessment quiz they completed before the workshop

Activity

Review example job description to be revised to be coaching-centric

This activity will be conducted in small groups and will then share answers with the class

Given a sample district manager's job description, the learner will rewrite it to be coaching-centric

Will need a sample district manager job description from Genentech

Activity

Analyzing average & effective
uses of field reports as coaching
tool

Print-based; scenarios/example field reports can be included in participant workbook for use during activity

(Working on getting copies of the blank as well as completed field coaching reports from Genentech to form our case studies)

- Read/view examples of sales calls and make recommendations on the best way to coach the representative based on the information seen during the session
- Divide into groups of two and read the case studies provided (field visit reports, scripted elements)
- With your partner, list 3-5 strategies that the effective coaches used and 4-5 improvements that the average coaches should make

Activity

Observe role-play (or video) of sales call and analyze approach to coaching

Part 1 workshop may be using role-playing based on scripts since the video is lost; part 2 would use video of same scenarios

Watch examples of sales calls and make recommendations on the best way to coach the representative based on the information seen during the session

- As a class, view the video (or role play) of a poor coaching experience. Next, view the video of an effective coaching experience.
- Compare and contrast the two examples
- Analyze and discuss observed patterns of behavior

Activity

Role play coaching discussion
with peers and provide feedback

PL to develop scripts/examples for this

Role play: setting objectives with representatives

Individual Activity

Action Plan for Optimizing Field Visits and Coaching

Print-based using participant guide

Depending on time constraints, this activity may be a take-home for the participant to send back to the RM

- Consider rankings done at beginning of workshop, scenarios and examples, and role-plays
- Participant will list at least five ways in which he/she may improve upon his/her coaching strategies and field visit tactics
- Think about how you currently manage your time and what keeps you from spending four days a week in the field. Now, write a time management plan that will allow you to spend four days a week in the field.
- Based on his/her team of representatives' learning and selling styles, the learner will list at least two ways in which he/she may tailor his/her coaching style to become more effective for each individual representative.