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Field Visits:

feared assessment or
motivational development?

Understanding how to make
field visits work productively
for both medical sales managers
and sales executives

by Allan M Mackintosh, BSc, FInstSMM, DipCM

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Field visits: feared assessment or motivational development?
First published January 2006 by NetworkPharma Ltd
89 Oxford Road, Oxford OX2 9PD, UK
Tel: +44 (0) 1865 865943
Web: www.networkpharma.com email: support@networkpharma.com

A CIP catalogue record for this title is available from the British Library.

ISBN-10: 1-905676-01-8 ISBN-13: 978-1-905676-01-9

Managing Director: Peter Llewellyn; Editor: Chris Ross; Production/editorial: Gill Gummer; Typesetting and artwork: Blenheim Colour

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Field Visits:

feared assessment or motivational development?

Allan M Mackintosh

Executive summary

Field visits occupy around 80% of a sales manager's time. The benefits to sales executives, managers and organisations in general are significant, yet the value of such visits is often questioned. The key to their success lies in how they are undertaken.

Lack of structure is a major factor in many of the poorest field visits. This leads to an absence of focus and, inevitably, a lack of action and development for the sales executive. This ultimately demotivates both parties. Managers must possess the necessary skills to ensure the field visit structure produces motivation, results and ongoing development.

A manager requires basic skill-sets to conduct effective field visits. The ability to build trust, rapport and respect is an essential ingredient for every good sales manager. The manager also needs to be able to contract the working relationship, to coach and to motivate an employee. Giving constructive and appropriate feedback is critical to the process.

Field visits provide support and advice for sales executives, assessment and relationship-building opportunities for sales management, and improve productivity for organisations.

This review outlines the essential aspects of a productive and motivational field visit.

Contents

Introduction

Having completed over 1200 field visits during my 13 years as a medical sales manager and sales coach, I know what it is like to get up early in the morning, spend hours on motorways or in aircraft, and return home late at night. I also experienced routine visits from managers and trainers during my 7 years as a medical sales executive, and so have 'lived' field visits from both perspectives.

Being a field manager can be extremely stressful, particularly if you consider the travelling and the fact that you can (and should) spend a full day with your executives and representatives. Similarly, it can be very stressful for the sales executive, particularly if their manager or trainer is not very motivational and does not have the correct skills to make these visits productive and inspiring.

This review supports all those hard-working sales managers in developing their field-coaching skills in order to alleviate the stress and strain of these visits, and make them work productively for both manager and executive. In it, I outline a number of models that I have either developed or found useful as a medical sales manager:

- **ASPIRES™ Model of Field Coaching** – to enable you to structure your field visits productively
- **Behavioural Styles Model** – to enable you to build rapport quickly and build up trust and respect
- **Capability/Motivation Grid** – to enable you to take the correct developmental approach with your salespeople
- **OUTCOMES® Coaching Models** – to enable you to coach effectively
- **Motivational Triangle** – to enable you to continually motivate yourself and your team.

There is, of course, more to field visits, and other aspects, such as field visit forms, fall outside the scope of this review. Each company will have their own types of forms but unless you get the structure of the field visit right and you build the essential skills needed to ensure field visits are effective then the forms are useless!

Whether you are a medical sales manager or a sales representative, I hope that you will find this review useful in your quest for greater sales success.

Allan Mackintosh
January 2006

About the author

Allan Mackintosh is a Training and Development Professional with over 23 years of experience in industry. The years he spent in the pharmaceutical industry have given him experience as a sales executive, sales manager, sales coach and trainer. He latterly spent 6 years working as a Manager/Development Coach with GlaxoWellcome and GlaxoSmithKline, before branching out to form his own management coaching business in 2001. His last industry role involved coaching top-flight sales executives, first-line and senior managers, and providing support to enable them to identify and achieve their business objectives. Particular emphasis was placed on supporting new managers who had been promoted to management from the sales function.

In May 2001, Allan founded Performance Management Coaching Scotland to promote the skill of coaching in management, and to enable and support managers to become great coaches in the workplace. Since starting Performance Management Coaching, Allan has steadily grown 'The Coaching Manager' brand and it now covers a book and three unique coaching models, in addition to an e-zine, e-book and several structured courses; details are available from his website www.pmcscotland.com

Allan can be contacted on +44 (0) 776 416 8989 or at allan@pmcscotland.com and is always keen to hear from readers about their experiences.

Field Visits:

feared assessment or motivational development?

Why are you doing field visits?

Field visits take up around 80% of a sales manager's time. The benefits to the manager, the sales executive and, ultimately, the organisation are undoubted, yet there are still those who question their value. It is clear that some representatives and managers actually dread field visits, with the former viewing them as a check-up on their abilities, and the latter seeing them as a chore. Field visits do, however, provide significant opportunities from a business and personal development perspective. The key to their success lies in how they are undertaken.

So what are the benefits of field visits (Table 1)? For the sales executive, they provide support, advice and mentoring opportunities. They also provide company – a valuable commodity in what is often a lonely profession. For the sales manager, field visits allow relationships to be built with representatives and enable them to assess, appraise and, crucially, support their staff. They also provide an opportunity to keep in touch with the market environment and to learn new skills. Organisations benefit from field visits in a variety of ways, not least in improving productivity. Customer perception of corporations is enhanced by what is clearly a demonstration of support for their representatives.

With such obvious benefits, why is it then that many managers and representatives actually dread field visits? There may be a number of reasons but in my experience it comes down to the following:

- The 'mindsets' of both manager and representative, who may regard the visit as a 'check-up' or 'assessment' as opposed to a 'motivational, productive and development' day.
- A lack of skill on the part of the manager in terms of how he/she structures the day.
- A lack of skill on the part of the manager in terms of essential people skills such as contracting and coaching.

Success lies in enhancing the capability of managers in terms of how they structure their field visits, and then building on their people and development skills. If this can be achieved, we can go a long way to changing how they view a field visit.

Success lies in enhancing the capability of managers to structure their field visits, and then building on their people and development skills

Benefits to the sales executive?	Benefits to the manager?	Benefits to the organisation?
• Support to develop skills • A chance to learn from someone else • Support to get feedback on skills • A chance to 'show off' skills • Company – sales can be lonely! • Support through coaching, and advice on issues and challenges • Someone to bounce ideas off • Support and challenge as to the progress of business and development plans	• Enables the manager to assess and support skills development • Keeps the manager up to date with what is happening in the marketplace • Shows the customer that the sales executive is being supported • Gives the customer someone else to shout at! • Enables the manager to brief and update the executive face to face • Allows the manager the chance to praise and reward the executive and, as a result, motivate them to higher performance • Gives the manager a chance to keep his/her own skills updated	• Shows the customer they are committed to employee development • Motivated employees are more committed and supportive • Employees' development is enhanced and, as such, should be more productive • More productivity means better results • Less employee dissatisfaction and attrition (provided field visits are carried out effectively!)

Table 1. Benefits of field visits.

Structuring the field visit

One of the most demotivating factors surrounding field visits is when there is little or no structure to them. Without structure there is no focus, and without focus, a potential lack of concerted action and development. Feedback from many representatives and managers supports this view and so, as a consequence, I developed the 'ASPIRES™ Model of Field Coaching'.[1] The aim of ASPIRES is to ensure that managers have a focused framework from which to carry out their field visits. The structure and main aim of each stage of this model are summarised in Table 2.

The ASPIRES Model of Field Coaching – skills required

Managers must also ensure that they have the skills necessary to ensure that the field visit structure produces motivation, results and ongoing development. Table 3 shows the skills that are necessary in order to make the ASPIRES Model of Field Coaching work.

Essential skills for effective field visits

Once a framework is in place for structuring the field visit, managers must ensure that they have the basic skills for effective field visits. The capabilities needed are as follows:

- The capability to build trust and respect through behavioural rapport.
- The capability to contract your working relationship.
- The capability to coach, and to know where and when to coach.
- The capability to give excellent developmental feedback.
- The capability to motivate and inspire.

This review looks at the key capabilities – building rapport, contracting, coaching and motivation.

	Overview of stage	Main aims of each stage
A	A = AGREEMENT or utilisation of a 'contract' between the sales manager and the sales executive	This is where the manager 'contracts' with the sales executive as to how best they are going to work together. It is usually done as a two-way agreement on how they are going to work together overall, but is also done prior to any field visit (usually by telephone) and then revisited at the start of the field visit. Done correctly, it can pave the way for quick trust and respect
S	S = SPECIFIC OBJECTIVES for both parties that have to be achieved during the day	At the start of the field visit, and probably as part of the contracting process, it is vital that each person's objectives for the day overall are discussed and agreed
P	P = PRE-CALL sales call objectives	Many managers do not spend enough time coaching sales executives through their specific sales call objectives for each and every sales call. This stage ensures that this happens before each sales call
I	I = IN-CALL agreement between both parties	It is important that before each call it is agreed what the roles are of both the sales executive and the sales manager during the call. Ideally, the manager should act as an observer and coach while the sales executive controls and executes the sales call
R	R = REVIEW of sales call and performance against specific sales call objectives	It is the role of the sales manager to coach the sales executive through a post-call review. Before giving feedback they should get the sales executive to do a self-analysis of their performance against the sales objectives that were agreed. Where appropriate, constructive and motivational feedback should be given to allow the sales executive to consider how best they could change aspects of the sales call next time round, together with reinforcing the parts that they executed well
E	E = ENERGISE & ENTHUSE prior to next call	This stage should be part of, and follow, the REVIEW stage. It is vital that praise is used where it is due and that a C-SMART[2] action plan is in place for the next call and for subsequent calls
S	S = SUMMARY & SUPPORT	This represents the final stage of the field visit day and both parties should reflect on their agreed objectives and whether the day has met these. Action plans should be summarised, with the manager making sure that the sales executive is motivated to move forward. The manager should also ascertain what support is needed in order that the momentum is maintained

Table 2. The ASPIRES Model of Field Coaching.

Building trust and respect through rapport

Building rapport is essential if you are going to influence people, particularly within field visits. You can quickly build rapport with people if you follow some simple guidelines.

Building rapport requires greater understanding of behavioural or personality styles, and an ability to flex your own style to complement that of your employees and your team. Flexing one's style can, under certain conditions, be difficult (e.g. when dealing with stress). It is vital, though, that managers lead the way and maintain rapport with their salespeople at all times. Too many managers refuse to change their style because their ego tells them that employees should be flexing towards theirs, since they are the boss. The result is usually a personality clash, and perhaps you can guess who stands to lose the most in that situation? However, if salespeople have the same knowledge of behavioural styles as the manager, they can learn to flex and accommodate too, especially with their own team, colleagues and customers. This will make it easier for everyone involved.

> *Building rapport is essential if you are going to influence people, particularly within field visits*

What are these behavioural styles, how do you identify them and how do you adapt your style to those of others? There are numerous models of behavioural styles and they are all based on work done in the 1920s by the psychologist Carl Jung. It would be beneficial for you to read more about his work, as well as familiarise yourself with models such as the Myers–Briggs Type Inventory[3] and the DiSC (Dominant, Influencing, Steady, Cautious) Personality Type.[4]

The four behavioural styles

Models of behavioural style are all very similar. The model I will introduce you to was developed by Wilson Learning[5] in the USA. It is the one I have used most in my career, and I find it works well. I also like the book by Dr Michael Lillibridge, entitled *'The People Map'*,[6] because it uses up-to-date and corporate language.

Both the Wilson Learning and Lillibridge models suggest that there are four distinct behavioural types. For each of us, our behavioural style can be viewed as our personal comfort zone, or the style we adopt most naturally when not under stress. Labels are used to identify these four behavioural styles; however, they ***are*** only labels. It is most important to be aware of the characteristics of each, and not just the definition of the label itself. It is also important to note there will be some crossover in almost everyone; therefore, there are no absolutes. Some characteristics will be far more prominent in some people's normal behaviour than in others.

Behavioural style 1 – Driver, controlling, leadership style: People who fit into this category are business-like and formal in appearance. Their main priority is the task at hand, and the results achieved. Their pace is fast and decisive. They prefer an atmosphere in which they can control people and processes, and achieve acceptance through their productivity and competitiveness. *Drivers* like to be in charge, seek productivity and dislike loss of control. They want you to get to the point, because they are irritated by inefficiency and indecision. They measure

	Overview of stage	Skills required
A	A = AGREEMENT or utilisation of a 'contract' between the sales manager and the sales executive	• Time management – without this the field visit won't happen as required • Behavioural analysis – required at every stage • Contracting – seems easy at face value but practice is needed to put the correct words around the contracting conversation
S	S = SPECIFIC OBJECTIVES for both parties that have to be achieved during the day	• Objective setting utilising C-SMART[2]
P	P = PRE-CALL sales call objectives	• Objective setting • Coaching – listening/questioning, etc.
I	I = IN-CALL agreement between both parties	• Contracting • Observing, listening
R	R = REVIEW of sales call and performance against specific sales call objectives	• Coaching • Giving and receiving feedback
E	E = ENERGISE & ENTHUSE prior to next call	• Use of motivational models such as the Motivational Triangle
S	S = SUMMARY & SUPPORT	• Combination of all of the above!

Table 3. Skills necessary to make the ASPIRES field visit structure work.

their personal worth by the results they achieve and their track record. Under pressure, these people will assert themselves strongly, and dictate the way things are going to be; they are autocratic.

To influence and work with these people, you need to support their goals and objectives, and demonstrate what your ideas will do, when you will do it and the cost. Such people want results.

Behavioural style 2 – Analytical, processing or task style: People using this style appear somewhat formal and conservative. Their main priority is the job at hand, and the process needed to achieve it. Their pace is measured and systematic. They prefer an atmosphere that encourages careful preparation and achieve acceptance through being correct, logical and thorough. *Analyticals* want recognition for being correct, seek accuracy and dislike embarrassment. They want you to be precise in your dealings with them, because they are irritated by unpredictability and surprises. They measure their personal worth by their degree of precision, accuracy and activity. Under pressure, these people will withdraw into their own world and avoid contact with causes of stress.

To influence and work with this personality, you need to support their thinking and show how your ideas will support their personal credibility.

Behavioural style 3 – People, amiable or supporting style: *People style* individuals appear to be casual, but conforming. Their pace is slow and easy. They prefer to maintain relationships and avoid confrontation. Therefore, they prefer an atmosphere that encourages close relationships, and achieve acceptance through conformity and loyalty. They need to be appreciated, seek attention and try to avoid confrontation. They want to be pleasant because they are irritated by insensitivity and impatience. They measure their personal worth by their degree of compatibility with others, and the depth of their relationships. Under pressure, people who have this behavioural style will submit or acquiesce.

In order to influence and work with such people, you need to support their feelings and show them how your ideas will support their personal circumstances.

Behavioural style 4 – Free spirit, expressive or enthusing style: *Free spirit style* personalities appear to be more flamboyant. They have a tendency to interact within relationships and they dislike any loss of prestige. Their pace is fast and spontaneous. They try to create an atmosphere that encourages flexibility. They achieve acceptance through sociability and creating a stimulating environment. They want to be admired, seek recognition and dislike being ignored. They want you to be stimulating because they are irritated by routine and boredom. They measure their personal worth by the amount of recognition and acknowledgement (or complaints) they receive. Under pressure, a free spirit style behavioural type person will become offensive or sarcastic.

A manager who wants to be successful influencing and working with people who use this style will need to support their dreams and ideas, and show them how he/she can help enhance their standing with others.

It is vital for the manager who wants to coach effectively to become skilled at building rapport quickly and easily. Knowing your own style and the styles of the people you manage can help you to build rapport by 'leading the way' and flexing your style. Table 4 provides a quick reference for identifying these styles through the use of body language.

Behavioural style body language	Driver, controlling, leadership style	Analytical, processing or task style	People, amiable or supporting style	Free spirit, expressive or enthusing style
Facial expression	Fixed	Fixed	Varied	Varied
Eye contact	Intense Long duration	Reflective	Empathetic	Intense Short duration Scattered
Posture	Formal	Formal	Informal	Informal
Body movement	Limited	Limited	More mobility	More mobility
Gesture size/frequency	Small/high	Small/low	Larger/low	Larger/high
Voice tone	Monotone	Monotone	Inflexion	Inflexion
Speed	Fast, clipped	Slow, measured	Slow, measured	Fast
Volume/force	Louder	Softer	Softer	Louder
Decision making	Quick Limited facts	Slower Lots of facts	Slower Lots of opinions	Fast Intuition

Table 4. Identifying the four behavioural styles using body language.

Contracting the working relationship

Contracting is simply an agreement between the sales manager and the sales executive outlining how best they are going to work together. Contracting should be carried out at the start of any working relationship and should be a two-way affair with both the manager and the executive sharing expectations of each other in terms of both behaviours and roles.

In relation to a field visit, a sales manager should effectively contract the following with their sales executive:

- The structure of the field visit day.
- Times of meeting at the start of the day and place to meet.
- What each person needs/wants to get from the day.
- What roles the manager will take during the day, particularly during the sales call.
- How feedback is to be given during the day – for both persons!
- The appropriate behaviours that each person requires from the other.

There are probably more tasks that can be contracted, and each field visit should be contracted right at the start of the day. Failure to contract effectively can lead to misunderstandings and unmet expectations, leading to disappointment, confusion and demotivation. Basically, contracting is an adult two-way conversation that is led by the manager but with the manager ensuring that the sales executive has 50% of the 'airtime'!

Contracting is an adult two-way conversation that is led by the manager but with the manager ensuring that the sales executive has 50% of the 'airtime'!

Effective coaching

Knowing when to coach and when not to coach – the Capability/Motivation Grid or Skill/Will Matrix

With the explosion of coaching courses and the fact that it is now a prerequisite that managers attend 'coaching' courses, many managers feel the need to coach whenever possible, and field visits present a golden opportunity to do just that. However, the manager must be aware that there are times when coaching is not the appropriate intervention and can be demotivational.

In my early days as a manager, I was often surprised by the reaction I got on field visits when I tried to coach a sales executive on a particular aspect of his/her sales call. Sometimes it worked, other times I just got a puzzled look and on one occasion I was told, "Look, just tell me the answer!" It was not until I explored the reasons why I was getting such reactions that I discovered that I was taking the wrong approach on occasion. Then I was introduced to the Capability/Motivation Grid or Skill/Will Matrix, and it all started to make sense to me.

Consequently, whether you are coaching or managing, it is critical to match your style of coaching interaction to the employee's readiness for the task. The Capability/Motivation Grid or Skill/Will Matrix will enable you to do this. The model is divided into four quadrants (Fig. 1):

1. Low capability/low motivation – the beginner in a role, project or task who is just starting out and is nervous or may have already tried and failed.
2. High motivation/low capability – the enthusiastic beginner new to a particular role, project or task.
3. Low motivation/high capability – the skilled experienced person who is in need of attention and might be affected by the challenge of change.
4. High capability/high motivation – the skilled worker who is looking for more opportunities to grow and develop.

Whether you are coaching or managing, it is critical to match your style of coaching interaction to the employee's readiness for the task

How to use the model

Step 1: Diagnose whether the coached person's skill and will are high or low for the specific task to be accomplished. Remember that this is related to the specific task and not to overall experience. You may have someone who you think fits into the 'high motivation/high capability' category because of his/her overall performance, but where he/she fits on the grid when given a new task or skill may not be evident.

- **Capability/skill** – depends on experience, training, understanding and role perception.
- **Motivation/will** – depends on desire to achieve, incentives, security and confidence.

Step 2: Identify the appropriate coaching/management style; for example, use 'guide/coach' if the person you are coaching has high motivation but low capability for the task (Fig. 1, box 2).

Step 3: Agree on your intended approach with the person you are coaching.

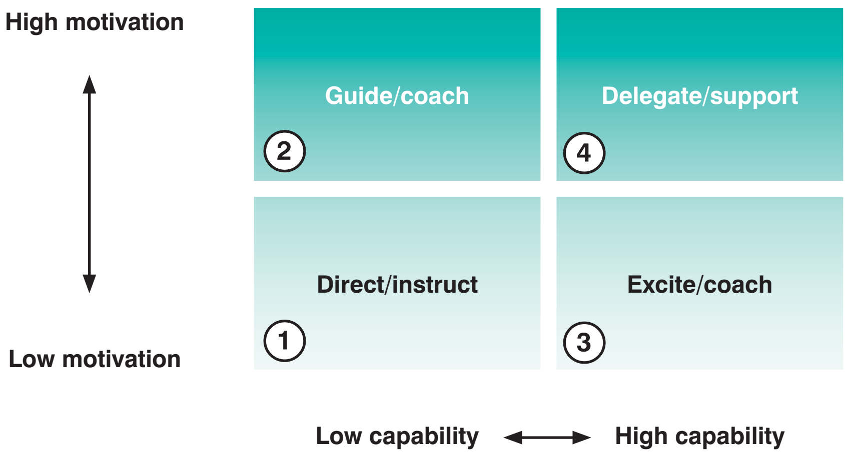

Fig. 1. How to identify the appropriate coaching/ management style.

Applying the model

Direct/instruct (capability and motivation are both low)

- First build will/motivation – provide clear and concise briefings; identify motivators and demotivators; develop a vision of future performance; ensure understanding of requirements.
- Then build skill/capability – structure tasks for quick wins; identify training requirements; train to build the skill.
- Finally, motivation – provide frequent feedback against progress; praise and nurture.
- Ensure close supervision with clear rules and deadlines.

Guide/coach (low capability, high motivation)

- Invest time early to ensure inclusion and understanding of training requirements – coach and train; answer questions/explain.
- Create a risk-free environment to allow early mistakes/ learning.
- Monitor progress regularly and ensure feedback and praise.
- Relax control as progress is shown.

Excite/coach (high capability, low motivation)

- Identify reasons for low motivation – task/management style/personal factors.
- Motivate appropriately.
- Monitor feedback.
- Ensure scope for regular progress checks/evaluation.

Delegate/support (capability and motivation are both high)

- Provide freedom to do the job – set objectives, not method; praise, don't ignore.
- Encourage coachee to take responsibility – involve in decision making; ask for their opinion.
- Take appropriate risks – give more challenging tasks ensuring support in place; don't over-manage.

Applying the capability/motivation principles will enable you to ensure that you are taking the appropriate approach with each individual in the team when asking them to perform tasks. Using the Skill/Will Matrix takes time, but when used effectively the model can help the manager to develop sales executives effectively while ensuring motivation is not compromised.

Effective coaching – the OUTCOMES® Coaching Model

It is widely accepted that the skill of coaching (and the subskills needed to coach, such as listening and questioning) is a prerequisite for managers if they wish to be effective in their roles. As mentioned earlier, the field visit is a great opportunity for managers to coach, and there are numerous times within the field visit that a manager can coach. Coaching can take place during contracting, objective setting and within the review process where the sales executive assesses his/her own performance against the objectives agreed with the manager. But how exactly does one coach?

The traditional model used in coaching is the GROW model, where G = Goal, R = Reality, O = Options and W = Will or Way forward. Many managers do not use the traditional GROW model as well as they should. They do not spend as much time as perhaps they should at each of the stages and, as such, do not explore the realities of situations and the options available in sufficient depth. A more structured model with extra steps would help them achieve this depth. To support this I have developed the OUTCOMES® Coaching Model.[7]

O = Objectives

It is important for a manager to assist an employee in identifying his/her objectives, either for his/her overall role or for a particular situation, be it a sales call or simply a specific coaching session. Taking time to support employees as they discover their objectives is vital and, once this is achieved, a visible improvement in an employee's morale can usually be seen. Many employees simply do not understand what specifically they have to achieve in their roles and, as such, become demotivated.

U = Understand the reasons

The second stage is to ensure that both you, as manager, and the employee understand the exact reasons behind the objectives. For what purpose does an employee want to achieve a particular objective? Sometimes employees want to achieve something in particular without thinking through whether it is a priority or not. For example, it has been estimated that 90% of managers spend their time working on non-priority areas and, as such, are not as productive as they could be. One of the reasons for this is that they are trying to achieve objectives that they feel they have to be seen to be achieving by senior management. The reality is that this is not what senior management wants to see!

So, by understanding the exact reasons why an employee is trying to achieve a particular objective, the manager can assist him/her to analyse what he/she is trying to achieve and why. In my experience, many original aims of employees are often discarded as they reassess their objectives.

T = Take stock of the present situation

It is important to take time to analyse exactly where an employee is in relation to a particular objective. How much has been achieved so far? Is the employee starting from 'zero' or has he/she gone some way to achieving the objective already? Once a 'reality check' has been performed, then you are in a position to move forward.

C = Clarify the gap

Once you have taken stock of the present situation it is important to clarify exactly what the gap is between where the employee is now in relation to the objective and what needs to be done to achieve the objective. Again, this stage takes time.

> *The OUTCOMES® coaching model enables managers (when trained effectively) to coach their employees in a more structured and effective way*

O = Options analysis

Once the actual gap is clear in the employee's mind in relation to what needs to be done, then it is the manager's role as coach to help establish how the gap can be closed and the objective achieved. Too often managers accept the first option that the employee comes up with, or alternatively, what they think the manager wants to hear! This usually results in the same old behaviours and 'tried and trusted' methods. The employee must be allowed to explore all the options available in terms of the pros and cons of each. Only in this way will you get the best option available for that particular employee. This is the way that new methods are encountered and, as a result, the employee and the company can grow.

M = Motivate to action

If the manager has taken time over the previous stages then at this point the employee will have a way forward that he/she has come up with and, as a result, should be motivated to move forward. Make sure that the employee writes down these actions; the manager should do likewise. Watch out for any physical signs of a lack of motivation. Many managers do not take time over the previous stages and 'lead' (or manipulate) the employee through the coaching process with a view to ensuring that the employee comes up with the manager's idea of what the employee should do. This should be avoided at all costs as it only leaves the employee demotivated, and this will show. Be aware of body language and voice tone and, if you have any inkling that the employee is not motivated to carry out the actions that he/she has outlined, then challenge the employee supportively to find out why.

> *Remember to praise!*

E = Encourage and enthuse

Managers do not do enough of this! Many managers 'leave' the coaching process once the employee has determined on a set of actions. Although the employee may seem motivated, he/she needs that motivation reinforced and what better way to do it than through praise. Remember to praise the employee for coming up with the actions and thank him/her for taking time to go through the coaching process.

S = Support

The final stage is about what support the employee needs from the manager in order to continue to be motivated to carry out the actions discussed. This doesn't mean the manager doing the actions for the employee, but could mean, perhaps, a weekly or even monthly progress check, or simply having an 'open door' or 'open phone' policy whereby the employee can access advice or simply share success. Support coaching by phone can be very effective and very few managers employ this skill.

The OUTCOMES coaching model enables managers (when trained effectively) to coach their employees in a more structured and effective way than perhaps they are presently used to doing. Whilst GROW will remain the standard coaching model for generic coaching, OUTCOMES will be a useful addition to the manager's coaching armoury.

Motivation

A former manager from my early days as a sales manager noticed that I had the ability to enthuse and energise my sales team. He asked me how I did it. I had not really thought about it and it was not until I started to analyse what I was doing that I realised what I was doing right. There were a number of things I was doing wrong, too, but we will look at that later.

One model that is very useful in helping understand what it takes to motivate an individual or a whole team is the Motivational Triangle

I asked my team for feedback about what I was doing right when motivating them to work harder and more effectively. This is what they said:

- I took time away from the tasks of the everyday job to sit down with people.
- I listened to, and tried to understand, what their hopes and fears were.
- I asked for their opinions on work-related matters.
- I asked what their motivators and demotivators were.
- I managed to link the tasks of the workplace to the benefits to be gained by the individual.
- I led by example in attitude and behaviour.
- I was trusted and trustworthy due to my honesty and accountability.

I also asked what they thought I was **not** doing right in terms of motivating them. They said:

- I wasn't very good at outlining boundaries. People sometimes did not know where they stood.
- I trusted people too much.
- I tended to rebel against senior management instead of 'managing' them effectively.
- I tended to give advice and tell people what to do instead of guiding them to formulate their own conclusions. I had a 'blanket' approach regarding the way I dealt with people. In other words I wasn't really coaching.
- I wasn't very effective when interacting with administration.

What does this have to do with motivation? I started to examine this feedback and I could see that if I continued some behaviours and adapted or changed others I would be able to motivate all individuals in the team, and sustain that momentum. The incentive for me was a motivated, responsible and accountable team that would be productive. This would allow more time for me to concentrate on strategy and facilitating forward movement of the business, instead of conflict resolution and stress management. As a result of improved performance, I could enjoy my time at work more and make more money.

It is important for the employer and employee to understand expectations

To add validity to my coaching approach, I linked this feedback to models of motivation developed by experts in the field. An overview of all the models that have evolved on the subject of motivation is outside the scope of this review, but I have found one model that has been very useful in helping me understand what it takes to motivate an individual or a whole team – the Motivational Triangle.

The Motivational Triangle

The Motivational Triangle is a simplistic model but, for me, it sums up motivation perfectly. I use this model routinely in my coaching sessions. There are three points to the Motivational Triangle (Fig. 2):

1. Freedom to choose: In any role there will be guidelines and boundaries. Once employees know exactly what these guidelines are, it is the role of the manager to enable and support employees to make their

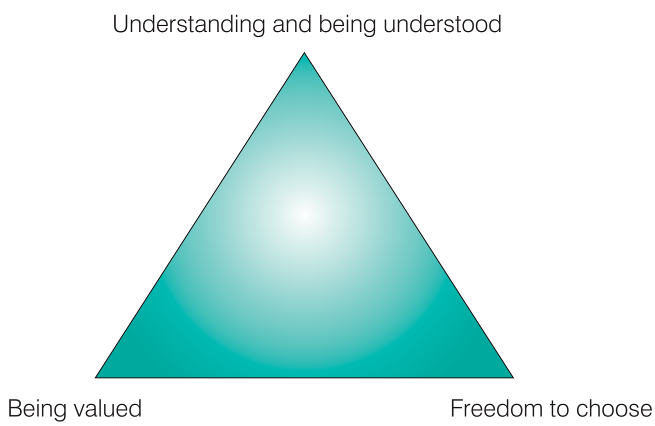

Fig. 2. The Motivational Triangle.

own decisions within these boundaries. Giving people choices enables them to feel ownership and hence motivation. Continually telling people what to do and not giving them a choice will result in demotivation.

2. Understanding and being understood: How many times have you asked an employee to do something only to find that they go away and do something different? The end result is that not only are you demotivated, but so are they. It is vital that you take time as a manager to understand your people and their circumstances. If something goes wrong, do not blame. Seek to find out exactly what went wrong and what can be done to prevent a recurrence. I have come across numerous examples where the root cause of an issue lies, not with what the employee has or hasn't done, but with inaccurate communication from the manager. It is important for the employer and employees to understand expectations.

3. Being valued: Praise is the most powerful form of feedback and as managers we do not use it enough. We seem to have an attitude that says, "Why should I praise someone for doing a job that is expected of them?" I addressed this at a seminar I led recently, and a manager asked, "What happens if you are observing a salesperson and nothing goes right at all. How can you start to praise?" I asked whether the salesperson in question had made an effort to get the sale. "Of course he had," came the reply. "So," I asked "Why not praise him for making an effort, and then explore what did not go as well as it should have and what the potential reasons were for this?"

We all need to feel valued in some way and it does not take very much for the manager to say "thank you" or "well done".

When you appear to have demotivated executives, take them through the Motivational Triangle and try to work with them to pinpoint those areas of the triangle that are being impacted upon. Use your coaching skills to enable them to work out what they can do to remotivate themselves.

> *It is important that managers self-assess their performance and collect regular feedback from their salespeople*

Conclusion

Within this short review I have attempted to outline what I consider to be the essential aspects of a productive and motivational field visit, namely a robust structure and an understanding of the essential skills that will ensure the structure works for both manager and sales executive. In order to enhance your development in this area you obviously have to put the theory into practice, ensuring that you self-assess your performance and also collect regular feedback from those salespeople you are visiting.

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Marketing ROI for Pharma

A KeywordPharma **Conference Insights** by **Dr Michel RM Rod** Published January 2006

ThePharmYard product code kwp001 ISBN-13: 978-1-905676-00-2

An in-depth report from the eyeforpharma
5th Annual Pharmaceutical Marketing Congress,
held in Amsterdam, 14–15 November 2005, written by Dr Michel RM Rod.

Executive summary

The pharmaceutical landscape is volatile. Research and development costs are soaring, purchasing power is being vested in fewer parties and regulations on pharmaceutical promotion are being tightened. Companies are under greater pressure to control spending and drive profits.

Return on investment (ROI) remains the common mantra from the boardroom downwards. Marketers are being asked to deliver bigger profit margins from diminishing marketing budgets and to demonstrate accountability when making promotional investments. With a better understanding of ROI analysis, pharmaceutical companies can develop and implement more effective marketing communications and enhance profitability.

The 5th Annual Pharmaceutical Marketing Congress – Marketing ROI for Pharma – held in Amsterdam, 14–15 November 2005, organised by eyeforpharma, showcased a diverse range of opinion in its attempts to establish best practice. This *Conference Insights* review provides analysis of the pertinent issues raised in selected presentations made at the event. It details issues such as how market research can play a major role in informing the decision-making process, and examines why the industry must adopt a more systematic approach to segmentation, targeting and positioning. Critically, it asks whether ROI is actually the best metric for evaluating marketing success.

Contents

About the author

Dr Michel Rod left his role as Manager of Intellectual Property Development at the University of Calgary, Canada, to begin an academic career at the School of Marketing & International Business at the Victoria University of Wellington, New Zealand, in 2001. He has a medical sciences background having received a BSc (Hons) in Pharmacology & Toxicology from the University of Western Ontario and an MSc in Medical Sciences (Neurosciences) from the University of Calgary. After having worked for several years in medical research, and sales and marketing environments, he completed his PhD in Commerce at the University of Birmingham, UK, in 2003.

His research interests include the development and management of collaborative relationships amongst university, industry and government organisations within the health sciences sector, pharmaceutical promotions, as well as the commercialisation of university-developed intellectual property. He has published in *Science and Public Policy, Qualitative Market Research*, *Canadian Journal of Neurosciences, Canadian Journal of Psychology, Stroke, Brain Research Bulletin, Management Research News,* and the *Journal of Transnational Management Development.*

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