




**Effective Coaching Drives Measurable,
Sustained Sales Performance**

An Echelon Performance Case Study

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Introduction



For decades, sales leaders have looked to the power of **One-on-One sales coaching** as a means to spur sales growth and foster competency development.

To this end, countless sales and training organizations have invested significant time and resources to operationalize the structure of coaching conversations – either through coaching models or leadership methodologies – with mixed results.

In this overview, we will show how one organization – by focusing on making coaching more **effective** – produced measurable and sustained improvements in sales performance and other organizational health metrics.

Effective Coaching

One-to-one coaching proven to deliver superior sales performance and accelerate competency development – is comprised of:

Consistency

Effective managers spend more time coaching and are significantly more likely to capture written coaching.

Focus

Top-performing managers focus more of their coaching on skills and competencies associated with their organization's sales, brand, and/or training strategy

Quality

Coaching from top managers is significantly more likely to reflect the six criteria associated with coaching quality (see next page).

Coaching Quality



Coaching quality is compromised of six criteria – the **BASICS**.



Balanced
coaching creates contrast between current and desired levels of proficiency.

Balanced



Actionable
coaching results in the sales representative having an active role in their development.

Actionable



Specific
coaching means detailed observations of representative execution.

Specific



Impact
Coaching to a team member's impact on customer decision making.

Impact



Continuity
means remaining focused on core skills and behaviors across multiple coaching visits.

Continuity



Supportive
coaching aligns with the representative's long-term developmental needs and goals.

Supportive

Scope & Methodology

This case study is based on Echelon's work with a single client over a 30-month period. This client:

Is a mid-sized US-based pharmaceutical manufacturer

- Operates three field sales teams
- Employs 93 first-line sales managers (FLMs) and 12 second-line sales leaders ("RDs").

Coaching from FLMs was provided to Echelon via the company's field coaching report (FCR) database.

- Following the initial **Baseline** analysis, additional analyses were conducted at monthly intervals for 30 months.
- In all, Echelon analyzed 1,487 client FCRs.

30-Month Period

Baseline Insights

For the Baseline analysis, Echelon reviewed 448 FCRs. Gaps were identified in all three effective coaching criteria.

Consistency

- Overall, FLMs were spending **far less time** in the field than prescribed.
- Sales leadership’s stated expectation was for FLMs to spend an average of three days each week in the field.
- At baseline, FLMs spent an average of 2.1 days/wk. in the field.

Days in the Field/Week



Focus

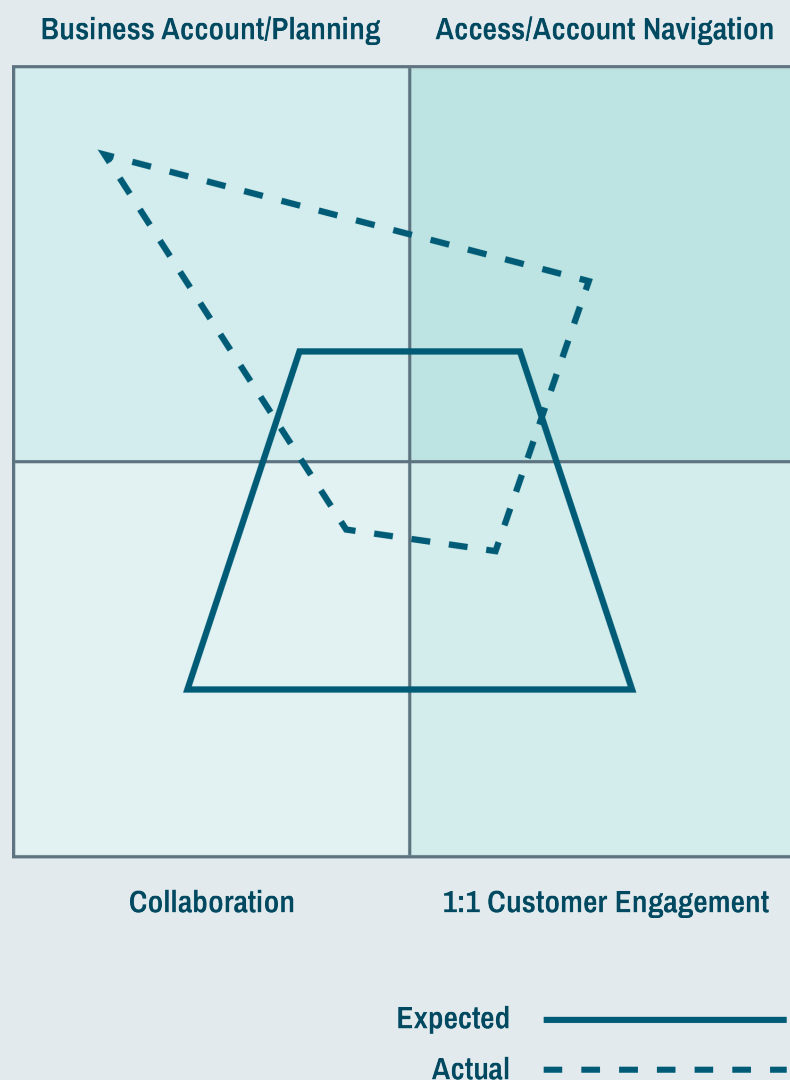
In terms of focus, commercial leadership expected FLMs to:

- Spend 60% of their time focused on skills associated with one-on-one customer engagement and/or collaboration;
- Dedicate 15-20% of their focus to business acumen/territory planning and another 15-20% to access/account navigation.

At Baseline, more than 60% of FLM coaching and feedback focused on sales results and other metrics (e.g., reach and frequency). Results and metrics, though considered part of business acumen/territory planning, are viewed as lagging indicators and not necessarily “coach-able.”

- Coaching to business acumen and territory business planning comprised less than 20% of focus.
- Less than 15% of written coaching was focused on 1:1 customer engagement (“selling”) skills or collaboration.

FLM Focus: Expected vs. Actual



Coaching Quality

At Baseline, FLM coaching lagged Echelon's Coaching Quality Index in all six criteria.

The Echelon Index is comprised of coaching from more than 30,000 FCRs from first-line sales managers in the pharmaceutical, medical device, and biotech industries.

Coaching Quality: Client Baseline vs. Industry



Closing the Gap

Leadership addressed specific gaps in coaching effectiveness with a combination of custom learning solutions and ongoing measurement.

Custom Learning Solutions

Echelon partnered with the client's sales training and leadership development functions to deploy solutions for:

- **Training & Development** (two workshops): one program for existing managers (delivered at a national manager meeting) and a second, shorter workshop for new FLMs.
- **Second-line Leaders: Second-line/regional leaders** were equipped with a series of 15 to 20-minute exercises for use in conference calls or team meetings as well as coaching guides for use with individual FLMs.
- **FLMs:** The client deployed five "Think Tank" tutorials to reinforce key concepts (e.g., field time expectations to coaching quality criteria). Five additional programs were developed before the end of the 30 months.

Ongoing Measurement

Semi-annual analyses were used to inform all levels of the sales organization:

- **Organizational summaries** were used to guide leadership development strategy, tool/resource development, and FLM workshops at national sales and brand meetings (e.g., POA).
- **Sales team summaries** were provided to sales leaders and Regional Directors.
- **Individual FLM "snapshots"** were given to every FLM. These reports included individual progress reports, personalized examples of "what good looks like," and prescribed actions to improve coaching effectiveness.

18-Month Progress Update

As noted above, Echelon conducted ongoing analyses in monthly increments.

By +18 months, significant improvements had been achieved and sustained across all three areas of effective coaching.

- By the fourth analysis, the client achieved an overall **33% increase** in the amount of field coaching (**Baseline = 2.1** days/wk. vs. 2.8 days at 18 months).
- In addition, Echelon analyses showed increases in the total **number of FCRs** completed (+27%) as well as the **duration of field visits** (+25%; 1.2 days average at baseline vs. 1.5 days at month 18).

33%

Days in the Field/Week – 18 Months



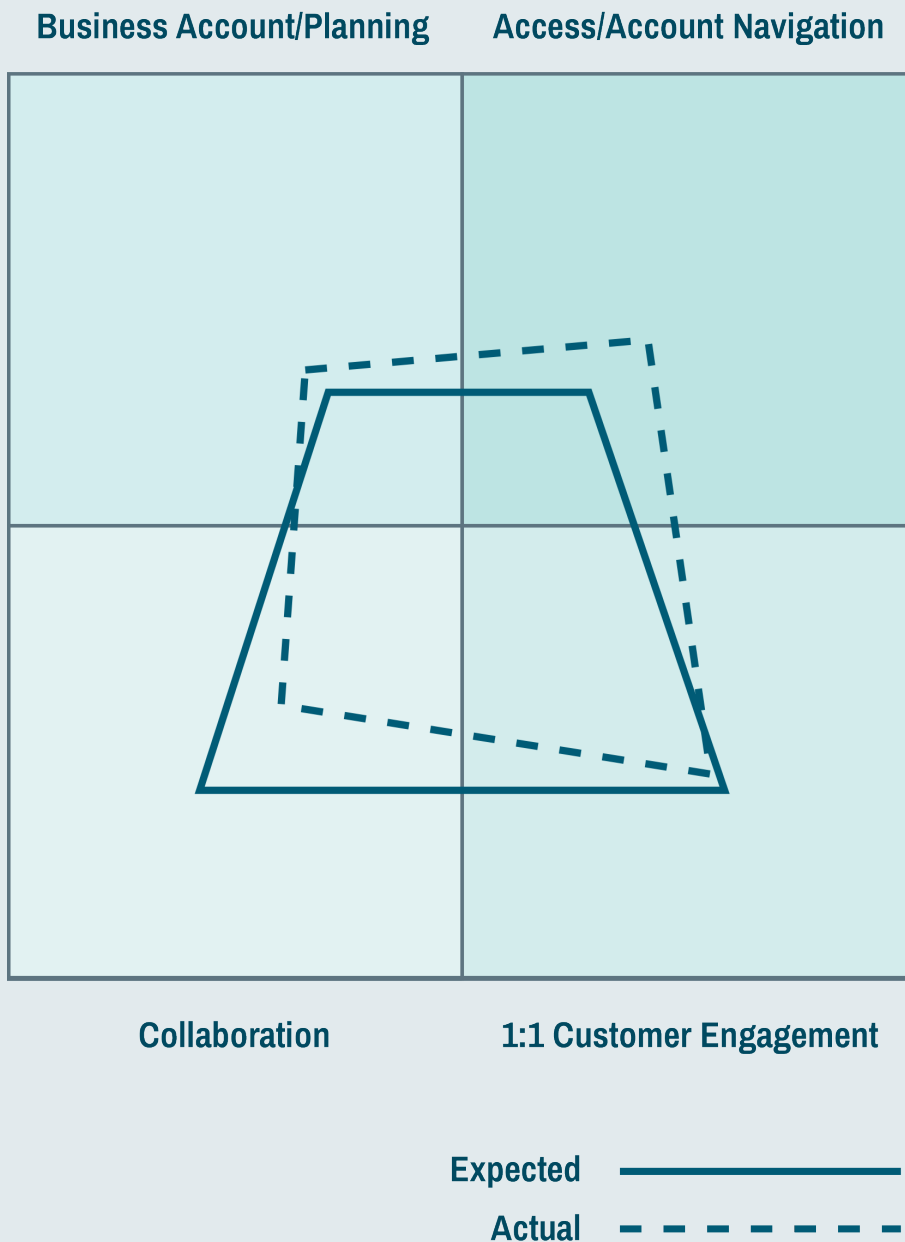
Sustained shifts in managerial focus were also seen.

- Echelon saw a **>100% increase** in the percentage of coaching to customer engagement skills (e.g., pre-call planning, identification of appropriate patients, messaging, etc.) as well as collaboration.
- FLMs spent less time focused on sales results and metrics, but more time on business acumen, territory, and business planning.
- The amount of coaching on access/account navigation (which includes access and program execution) remained relatively consistent.

1000%



FLM Focus: Expected vs. Actual



18-Month Progress Update continued

By month 18, coaching quality met and/or exceeded the industry average in all six criteria.

- On average, FLM coaching quality improved 57% in the first 18 months of the program.
- Client FLMs sustained and in many cases improved on this level of quality throughout the remainder of the 30-month program.

57%

Coaching Quality: Client 18 Month Update vs. Industry



Business Impact

Sales Productivity

As noted at the outset, the overarching goal of this platform was to improve sales productivity.

Sales productivity, for the purposes of this case study, is defined as the percentage of sales representatives and FLMs achieving or surpassing their annual goal.

- By the end of the 30 months double-digit increases were produced and sustained in both representative (+19% goal attainment) and FLM (+16%) productivity.

Sales Productivity



Business Impact continued

In addition to sales productivity, significant (>10% increases) were also achieved in the following key performance indicators:

- **Retention** of sales talent (as measured/reported by human resources)
- Sales employee **engagement** (measured/reported by human resources)
- Use of **brand resources** (as measured/reported by marketing)
- Use of **training resources** (measured/reported by learning and development) and
- Several criteria associated with the McKinsey Organization Health Index (OHI) including FLM **Accountability** and **Leadership**.

≥ 10%



“

A lot of companies come to us and make big promises. Echelon is the only one that delivered everything they said...and more. There were so many ‘ah-ha’ moments for our team.”

- Regional Director, Specialty Sales

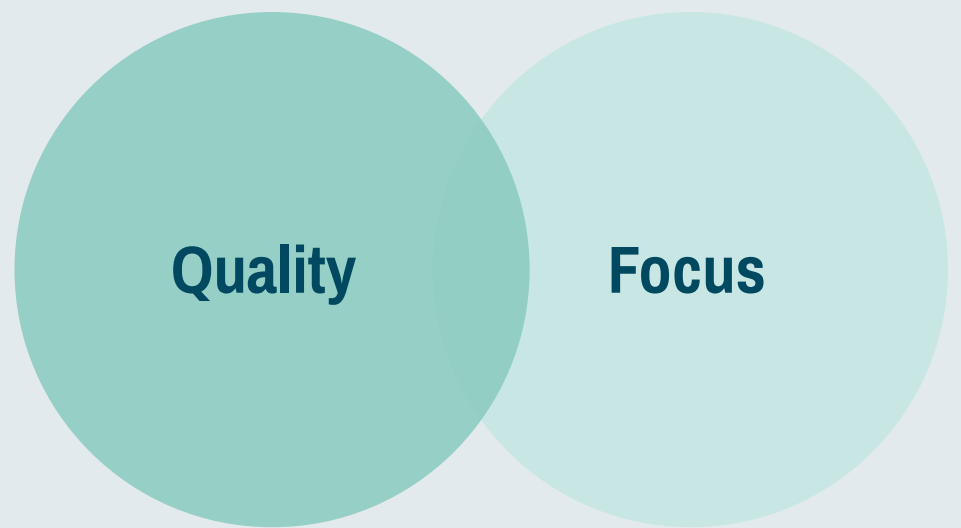


“

If I ever have to interview for another job and they ask me which accomplishment I am most proud of, I will say this program. No doubt.”

- Sr. Director, Leadership Development

Summary



Organizations looking to boost sales performance often look to sales coaching as a “lever” they can pull to enhance results.

These same organizations often make a common mistake: they look to streamline and/or standardize the structure of the coaching conversation.

Sales organizations such as the one profiled here achieved measurable and sustained improvements in sales productivity as well as other organizational metrics by prioritizing **effective coaching** – “consistent, focused, high-quality coaching.”

In developing, implementing and sustaining this platform, this client showed that an integrated approach – including custom learning solutions and ongoing measurement – can and will produce desired growth and return on learning and development investment.

Let’s bring these insights to your commercial team. Contact Echelon at 732-305-0205 to start a no obligation preliminary analysis.

To learn more about Echelon’s CoachAlytics platform visit us at thinkechelon.com/insights

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