

Coaching for Impact - 2025

Coaching Best Practices that Deliver Measurable Results



ECHELON
Elevate coaching. Accelerate performance.



For more than a decade, sales and learning professionals have known that effective, high-quality sales coaching has a positive and profound impact on performance.

More recently, researchers have looked to make a connection between specific aspects of coaching and business impact. For example, In a study published by Better Up, skills coaching helped individuals become more goal-oriented by assisting them in setting clear, measurable, and achievable goals. According to the publisher, this approach not only aligns personal ambitions with organizational targets, but also enhances focus and drives performance across teams.

In addition, businesses that have implemented **team** coaching have seen it lead to increased revenue and employee engagement. Specifically, organizations with strong coaching cultures have reported higher revenue, with 51% of companies observing this benefit. Additionally, in such organizations, 62% of employees consider themselves “highly engaged,” which is crucial for long-term organizational success (Source: Mindvalley Blog).

- **The goal of Echelon’s analysis was to identify how, specifically, top-performing managers create similar results with their coaching.**

This paper is comprised of four main sections:

1. “Effective coaching” defined & Methodology
2. Coaching Best Practices: What coaching best practices do top-performing managers leverage? How do we know their coaching is effective?
3. High-quality coaching – the BASICS
4. Therapeutic area best practices

About Echelon Performance

- Founded in 2006, Echelon Performance is dedicated to measurably and sustainably enhancing coaching effectiveness at all levels of leadership.
- At the time of this analysis, Echelon has reviewed more than 50,000 virtual coaching conversations and field coaching reports (FCRs).
- Using a blend of artificial intelligence (AI) and human analysis, Echelon can accurately and actionably determine the presence of effective coaching in a given team, department or field force and make recommendations regarding opportunities for measurable impact.



Effective Coaching Defined




Effective coaching is defined as *consistent, high-quality coaching focused on skills and behaviors associated with strategy.*

Why It Matters:

Over the past nearly 20 years, Echelon has reviewed coaching conversations and written coaching from dozens of field sales teams in the pharmaceutical, biotech, medical device and diagnostic spaces.

Coaching from these organizations has repeatedly shown that:

- There is a **greater than 90% correlation** between managers who provide effective coaching and top sales performance, and
- Fewer than 15% of managers in any given field team or department provide effective coaching on a consistent basis.



There is a >90% correlation between highly effective coaching and top sales performance

For this study, Echelon conducted a meta-analysis of first-line managers identified by their organizations as top performers and compared their coaching with an equal number of managers selected at random.

Our goal was to identify what, if any, measurable differences could be seen between these two cohorts in terms of two criteria associated with effective coaching:

- **Focus of coaching**, and
- Coaching **quality**

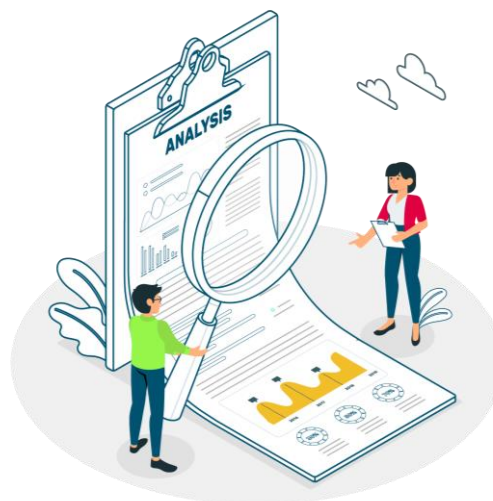
In all, Echelon analysts reviewed 288 virtual coaching conversations and field coaching reports (FCRs) from the top-performing cohort (n=27 managers) and 260 conversations/FCRs from average performers (n=28).

All coaching included in this analysis was completed and communicated over the same 20-month period.



Coaching from top-performing managers is significantly different from that delivered by average managers. Coaching from top-performing managers consistently reflects four best practices that, when taken together, have a dramatic and lasting impact on performance:

1. **Focus:** Top-performing managers were significantly more likely to focus their coaching on skills and behaviors associated with strategy (page 7)
2. **Skill Development Goals:** Top managers articulate and reinforce short- and long-term skill development goals to facilitate momentum in their coaching (page 9)
3. **Engage team members** throughout the coaching process: Top managers were significantly more likely to engage their team members in all aspects of coaching, including preparation (development of skill goals), coaching (role play and skill modeling), and post-coaching/pull-through (page 12)
4. Create a **coaching 'biome'** that elevates the vital nature of skill development : Top managers supplement their in-person or virtual coaching by including skills coaching in a variety settings (page 14)



Best Practice 1:

Focus on Skills that Support Strategy

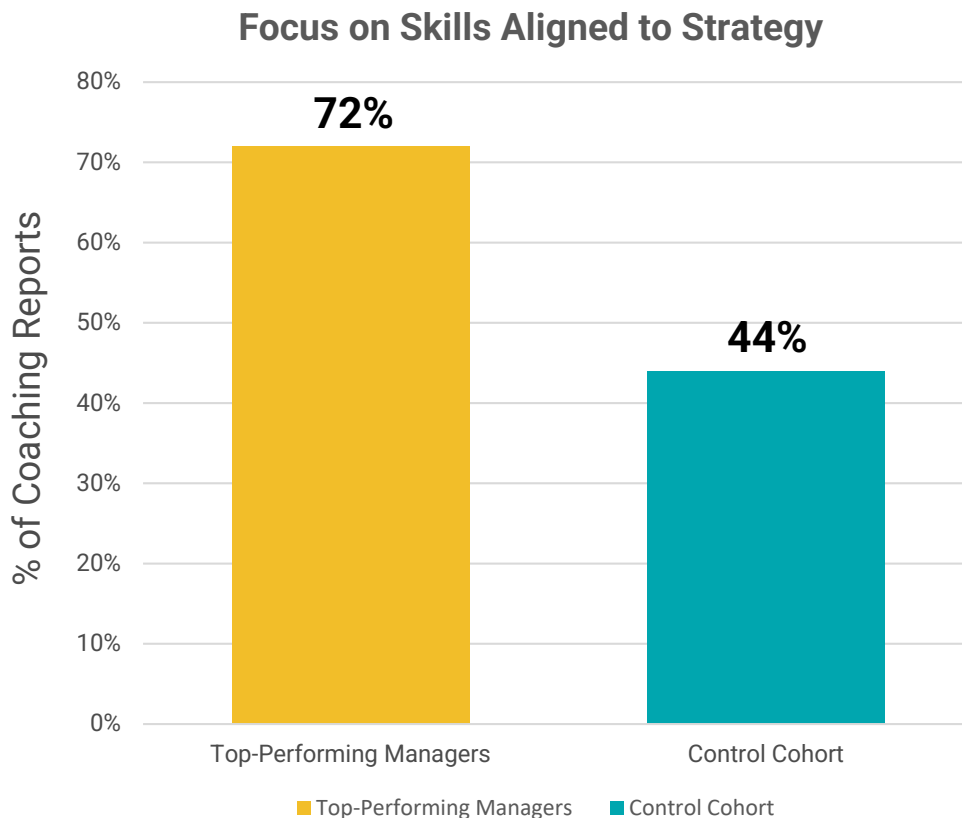


Top-performing managers are 64% more likely to coach to specific skills that support strategy.

For the purposes for this study, Echelon considered three subsets of skills that would support commercial strategy:

- Customer engagement skills/selling skills
- Skills that support brand strategy (e.g., messaging, use of visual aids, pull-through of market access)
- Account management (business and account planning)

Of the field coaching reports completed by top-performing managers, 72% (n=207) included coaching to skill(s) aligned with strategy.



Best Practice 1:

Focus on Skills that Support Strategy

Overall, the four most common skills coached by top-performing managers are:

1. Fluency with clinical resources (e.g., data)
2. Gaining commitment/closing
3. Use of questions, and
4. Planning (call planning, territory and/or account planning)

Of Note

More than half the coaching reports from top managers (55%) included coaching to clinical engagement while fewer than 20% of FCRs in the cohort mentioned this skill.

- A similar disparity was seen in gaining commitment



Best Practice 2: Set and Coach to Skill Development Goals



Many of the field coaching report technologies available in the market today have the capability for managers and/or representatives to articulate development goals for a field visit (i.e., short-term goals).

Many systems also have the capability for a manager and their representative to revisit long-term development goals (e.g., working on a specific skill for an extended period of time).*

In this analysis, Echelon reviewed these sections, where available for:

- The **presence** of long- and short-term goals, as well as
- The **quality** of those goals

In terms of quality, we used a three-tier grading system to assess a section or space dedicated to articulating long- and/or short-term goals:

Rating	Meaning	Example
0	Section left empty by FLM	N/A
1	Minimal or incorrect use of dedicated space	<ul style="list-style-type: none">• "I look forward to our day together."• (From the team member's perspective) "Here's a list of the accounts we'll be seeing."
2	Optimal use; includes short- and long-term development goals; SMART format	<ul style="list-style-type: none">• "It looks like you have a solid day planned for us. In your meeting at Mercy Medical, I'd like to make sure I have the chance to observe you using the specific skills we've been focused on, specifically the use of thoughtful questions. We'll meet beforehand to review the questions you developed."

Best Practice 2:

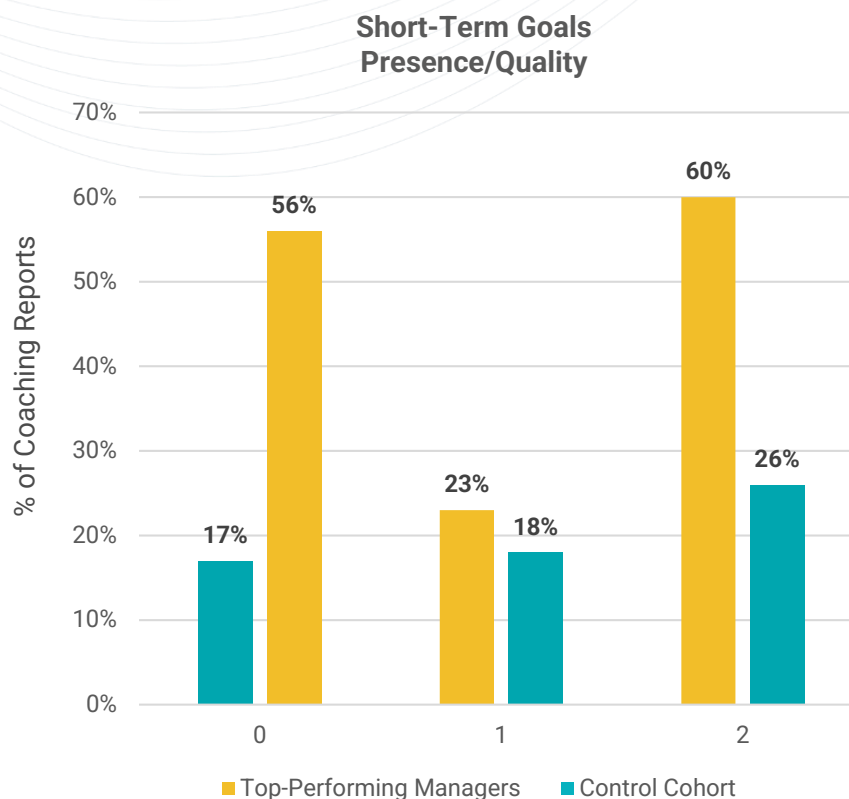
Set and Coach to Skill Development Goals

Top-performing managers are significantly more likely to articulate or reiterate short- and long-term skill development goals as part of their coaching.

Interpretation:

Short-term skill goals are critical for a variety of reasons:

- First, they provide an opportunity for managers and team members to re-connect around skill development and elevate the discourse around both commercial strategy and skill development.
- Secondly, they provide an additional “why” behind the coaching conversation or field visit. Too often, managers limit face-to-face time to conducting lengthy business or “pipeline” reviews while re-engaging with key customers. By setting and confirming completion of a short-term skill goal, managers and team members can feel a tangible sense of accomplishment, a vital component of effective coaching.



Best Practice 2:

Set and Coach to Skill Development Goals

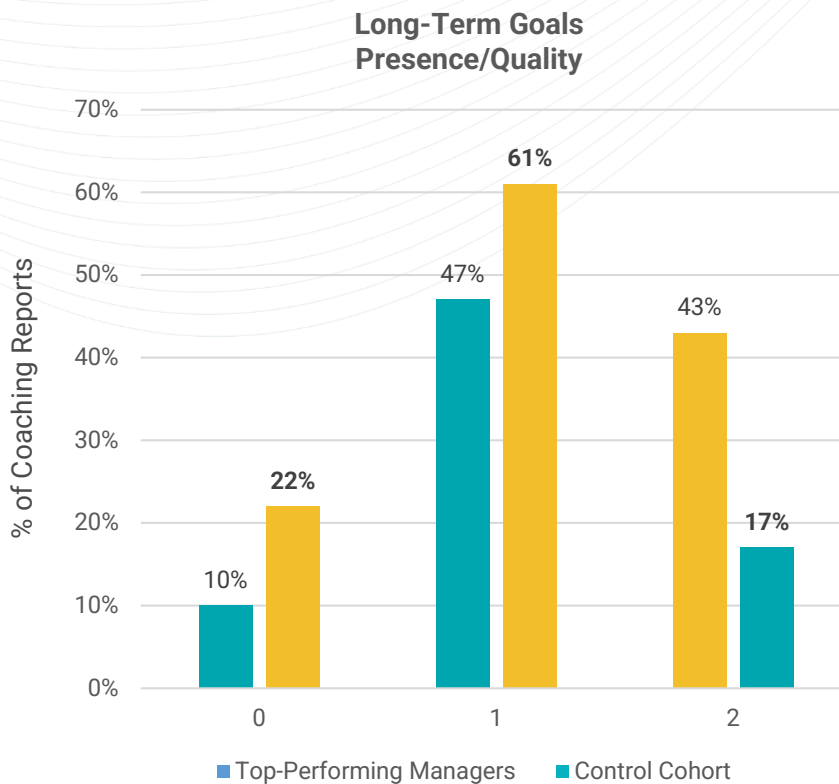


Long-Term Skill Development Goals

Like short-term goals, the development and reinforcement of long-term skill development goals are crucial to creating team member/coachee engagement.

Top performing managers were **more than twice as likely** to reinforce a long-term development goal in their coaching plan and more than **three times as likely** to include a skill development goal as part of their plan for their coaching visit.

In contrast, nearly one-quarter of average managers made no reference to a long-term development goal; more than half had no stated development goal for the coaching visit.



Best Practice 3: 'Full-Contact' Coaching

Top-performing managers are more than four (4) times as likely to engage team members in their own development throughout the coaching process. This includes:

- Goal-setting,
- Role play,
- Skill modeling, and
- Follow-through

Key Marker: Actionable Coaching

Of all the BASICS criteria associated with coaching quality, the most significant difference between top and average managers was found in the use of Actionable Coaching.



Best Practice 3: Full-Contact Coaching

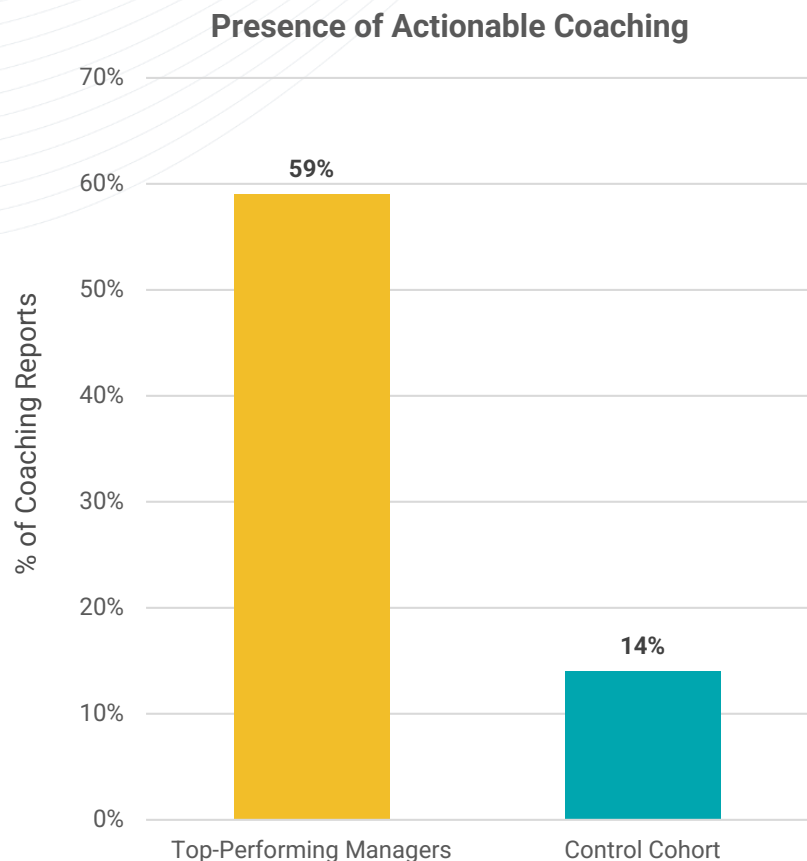


Actionable Coaching, by definition, involves a manager leveraging skill-building exercises to engage sales team members in their own development, pre- and post-coaching.

The impact of Actionable coaching is a more engaged team member.

Actionable Coaching: A Key Differentiator

- In this analysis, 14% of coaching conversations and reports from the average manager cohort contained Actionable Coaching; 59% of top managers included Actionable coaching in their approach.



Best Practice 4: *Creating the 'Coaching Biome'*

Top managers extend skills coaching beyond the field visit. They elevate discourse around skill development to a top priority by connecting coaching conversations – either live or virtual – with additional touchpoints.

Specifically, high-performing managers were more likely to refer to a wider variety of other resources and settings to support their skills coaching in addition to the coaching report. These include:

- Email
- Interoffice “chat” platforms (e.g., Slack, WorkDay)
- Text
- Team meetings, and
- Virtual meetings



Best Practice 4: Creating the 'Coaching Biome'



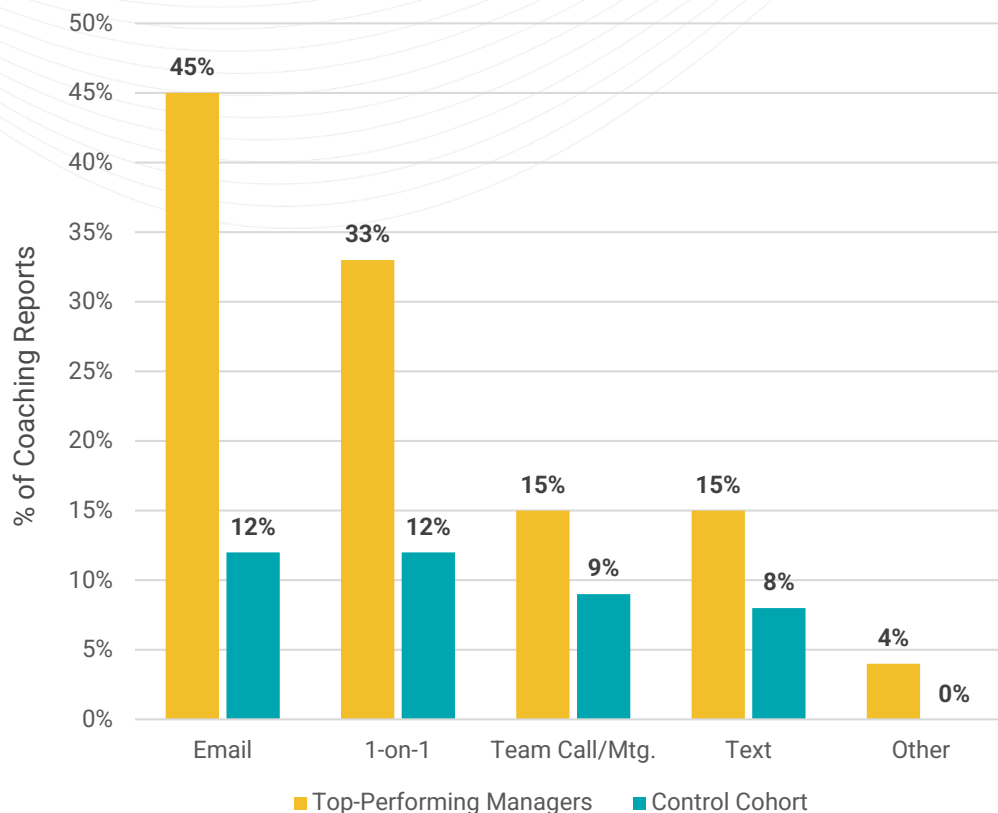
Nearly half of coaching reports from top managers reference specific follow-up in the form of an email; one-third reference further discussion in an ensuing one-on-one.

In essence, top managers create a multi-modal conversation focused on skill development.

In our experience, the effect of these efforts is two-fold:

1. Engaging a team member in a discussion of skill development outside of the coaching conversation (e.g., field visit, one-on-one, etc.) elevates its importance, and
2. This approach enables top-performing managers to create greater momentum and enthusiasm for professional development amongst their team members.

Skills Coaching Beyond the Field Visit



Coaching from top-performing managers is significantly different from that delivered by average managers. Coaching from top-performing managers consistently reflects four best practices that, when taken together, have a dramatic and lasting impact on performance:

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- 2. Skill Development Goals:** Top managers articulate and reinforce short- and long-term skill development goals to facilitate momentum in their coaching.
- 3. Engage team members** throughout the coaching process: Top managers were significantly more likely to engage their team members in all aspects of coaching, including preparation (development of skill goals), coaching (role play and skill modeling), and post-coaching/pull-through.
- 4. Create a coaching 'biome'** that elevates the vital nature of skill development : Top managers supplement their in-person or virtual coaching by including skills coaching in a variety settings.



Coaching Quality

Six Criteria Known Collectively as the BASICS



When it comes to measuring coaching effectiveness the quality of coaching is a key factor. At Echelon, we look for the presence of six attributes – known collectively as the BASICS to gauge the overall quality of coaching.

Actual examples of coaching that meets each of the six criteria can be found on the ensuing pages.

Balanced

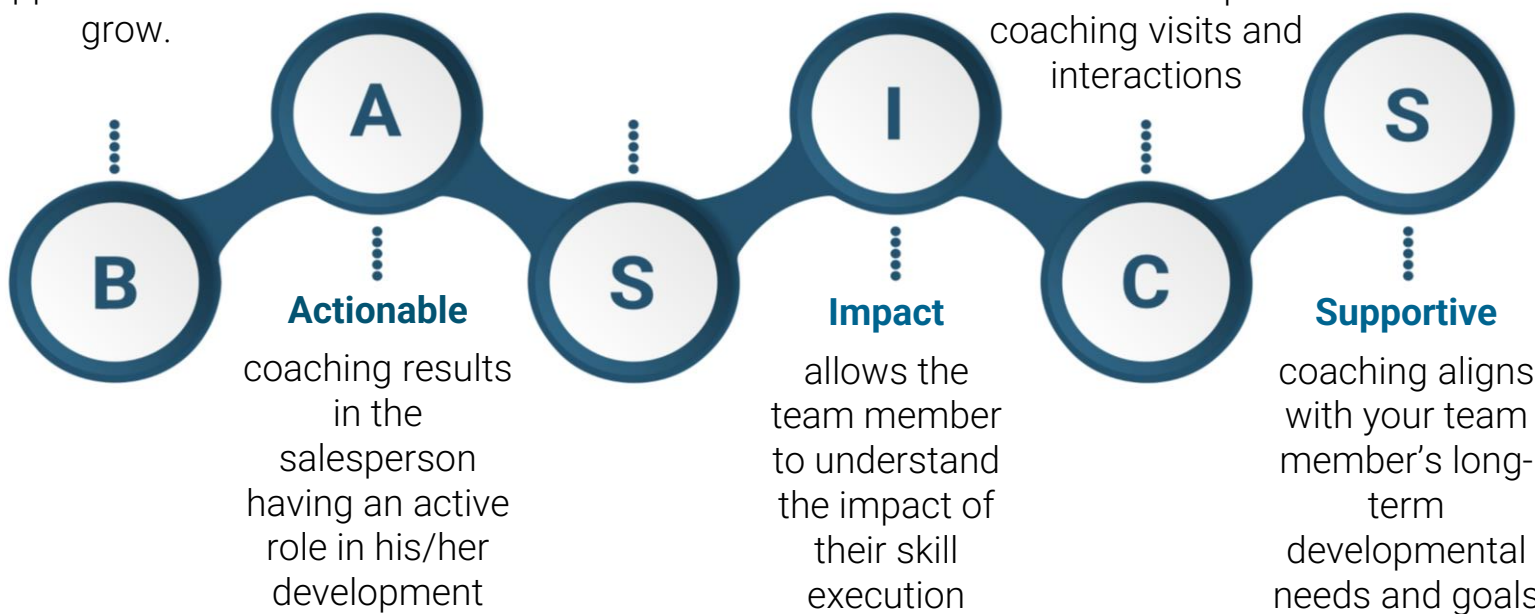
coaching contrasts current proficiency with opportunities for grow.

Specific

Coaching means detailed observations of a specific skill

Continuity

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



Balanced Coaching is powered by contrast – the contrast between where your team member is today in terms of skill proficiency and where they need to be.

Here's an example of best practice Balanced Coaching from a first-line manager in the oncology therapeutic area:

- "Lisa, recognizing your goal to enhance patient-centric discussions, your approach today with Dr. Mitchell was outstanding. When you connected our new treatment for hypertension to Dr. Mitchell's concerns about managing medication adherence and minimizing cardiovascular side effects, it directly supported your broader objective of delivering comprehensive care solutions. This approach not only facilitated a more meaningful conversation but also reinforced your position as a trusted resource in cardiovascular care. Continue to incorporate these elements into your interactions to align with both your professional growth aspirations and the needs of Dr. Mitchell's patients."



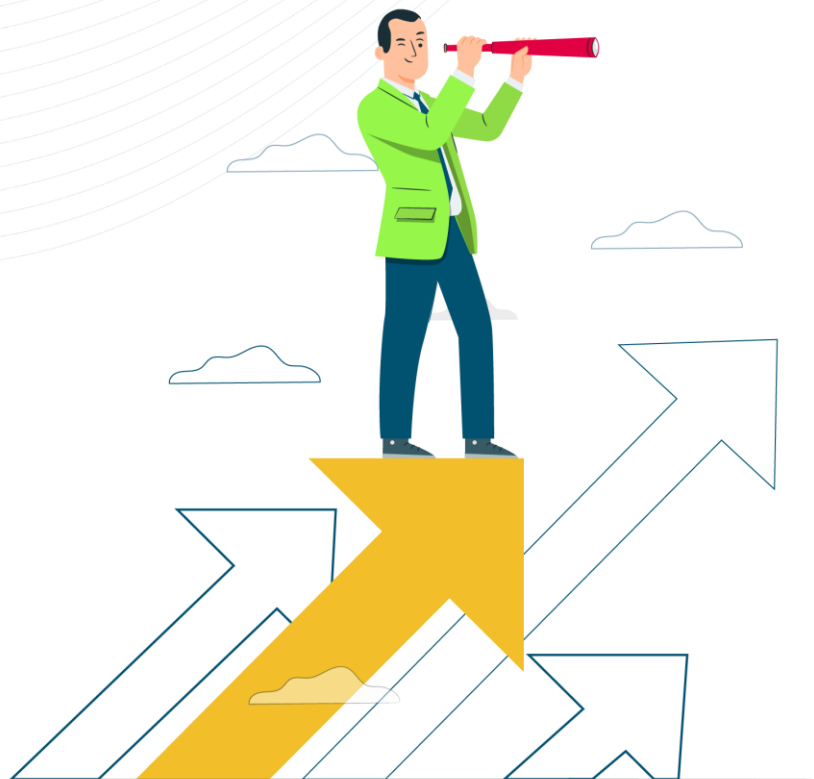
Actionable coaching results in the salesperson having an active role in his/her development

- "Sarah, given the complexity of treating conditions like coronary artery disease (CAD) with comorbid conditions such as congestive heart failure (CHF), it's crucial to engage deeply with healthcare professionals about their treatment strategies. For our next visit with Dr. Mitchell, I want you to prepare three open-ended questions that explore his current approaches to managing patients with these overlapping cardiovascular conditions. For example, consider asking, 'Can you share your experiences with the challenges of treating patients who present with both CAD and CHF?' or 'What factors do you consider when selecting treatments for patients dealing with multiple cardiovascular diagnoses?' Please draft these questions and email them to me by Thursday. I'll review and provide feedback to ensure they will facilitate a thorough and insightful discussion."



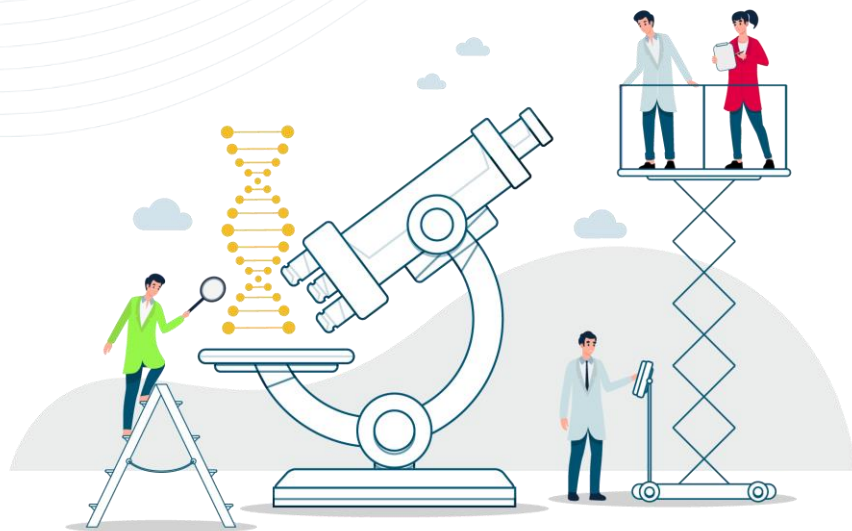
Specific coaching means detailed observations of salesperson execution

- "Tom, during your conversation with Dr. Mitchell about our new treatment for atrial fibrillation, you effectively addressed his concerns by saying, 'I understand your concern, Dr. Mitchell. Let's review the clinical data from our latest study, which shows a 60% reduction in arrhythmia episodes within the first eight weeks of treatment.' This specific reference to the study and its results not only reassured him but also demonstrated the efficacy of our treatment in a clear, evidence-based manner. By providing these precise details, you helped Dr. Mitchell better understand the potential benefits for his patients with atrial fibrillation."



Impact allows the team member to understand the impact of their skill execution.

- "Tom, when you asked Dr. Carter about his experiences managing patients with refractory hypertension, it had a noticeable impact. Your question prompted Dr. Carter to share detailed patient cases, which allowed you to introduce our new treatment's unique mechanism of action and its success in similar cases. This led Dr. Carter to express increased interest and request additional information on the treatment. Your targeted question not only deepened his engagement but also positioned our product as a potential solution for his most challenging cases."



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

- "Jeff, in our last coaching session, we focused on improving your discussions about long-term treatment outcomes with cardiologists. Today, I noticed that you successfully built on this by engaging Dr. Thompson in a conversation about the long-term cardiovascular remodeling benefits of our new treatment for heart failure. You referred to our previous discussion points about the importance of addressing both immediate symptom control and sustained cardiac function improvement. Dr. Thompson appreciated this comprehensive approach and showed increased interest in prescribing our treatment. It's clear that you're effectively incorporating our previous coaching into your interactions, which is excellent progress."



Supportive coaching aligns with your team member's long-term developmental needs and goals

- "Lisa, I know your long-term goal is to become a trusted advisor to cardiologists in your territory. Your interaction with Dr. Patel today was a great step towards that goal. When you connected our new treatment's benefits for patients with both hypertension and atrial fibrillation to Dr. Patel's focus on improving long-term patient outcomes and quality of life, it showed your understanding of his priorities and reinforced your role as a valuable resource. Keep aligning your discussions with the specific goals and needs of your healthcare providers, and you'll continue to build those trusted relationships."

