



ECHELON

**Leveraging Objective
Insights from Field
Contact Reports**



How effective are your first-line managers (FLMs)?

For years, commercial teams have been hamstrung by a lack of actionable answers to this question.

Many organizations, unfortunately, rely solely on anecdotal evidence to draw conclusions and develop learning strategies and curriculum. These companies send second-line managers (e.g., “RDs”), training personnel, and other commercial stakeholders into the field for “blitz” or immersion days, only to walk away with an incomplete picture of managerial effectiveness.

Others rely on off-the-shelf surveys and assessments. The problem here is that, by and large, input into these surveys is heavily subjective, resulting in skewed data. As an example, two separate clients who had invested in the Corporate Executive Board’s managerial survey recently shared their results with Echelon. In both instances, FLMs were rated among the most effective in the world. Not just pharma or life sciences—the world. Suffice to say, leadership in these organizations remains skeptical.

Still, other organizations rely on three-in-a-car field rides for their insight. These days can be valuable in terms of opening the lines of communication, but rarely do they provide any insight into managerial impact.

Insight

Analysis of more than 30,000 field coaching reports from leading commercial teams provides us with objective data that we use to equip you with actionable insight into the quality of field coaching.

Why do we mine FCRs for insight?

- They are **plentiful**. Most commercial teams require managers to complete an average of eight to 12 FCRs per rep per year.
- They are **stored** in a central location. Commercial teams typically maintain a central database for completed FCRs.
- They are **standardized**. There is no standardization across the industry, but with few exceptions, every manager in a given field team is using the same tool.
- They are objective sources of insight. In addition to serving as a source of quantitative insights (e.g., overall number of field rides, duration of field visits, turnaround time to the rep), FCRs provide organizations with a host of actionable insight into managerial effectiveness at the organizational, regional, and individual levels.





Case Study

In partnership with a long-time client, Echelon recently completed a blinded analysis designed to identify what, if any, correlation exists between the quality of coaching captured in FCRs and overall sales performance.

In phase one, Echelon reviewed **247 field contact reports from 48 managers across six regions**. These FCRs were rated according to their adherence to the following qualitative criteria (i.e., the BASICS):

Balanced

Provides a contrast between the current and desired level of skill proficiency

Actionable

Facilitates a sense of ownership on the part of the “coachee”

Specific

FCR includes a detailed description of skills and behaviors

Impact

Includes feedback and coaching on coachee’s ability to impact on customer decision making

Continuity

Creates momentum in the development process by providing ongoing coaching to a small number of skills or behaviors

Supportive

Aligns to the individual employee’s development plan, goals and needs

Quality of Coaching

Results

Upon completion of the analysis, Echelon provided the names of 10 managers whose coaching and feedback most closely adhered to the qualitative standards outlined above.

The names of these 10 managers were sent to the client, who then crosschecked coaching effectiveness with a series of sales KPIs including overall performance, portfolio growth, and market share.

Overall, there was a 90% (9/10) correlation between the FLMs that provided the most effective feedback and the top 10 managers in terms of sales performance.

Since the initial analysis, this client has elevated its focus on effective coaching to include:

- Ongoing (monthly) analysis of coaching focus and quality
- A targeted learning and development curriculum for FLMs, and
- Sales leader engagement with tools needed to make coaching skills part of their ongoing dialogue.

The data shows that there is a strong correlation between coaching effectiveness (quality and focus) and overall sales performance.

In and of itself, this finding is not surprising. Effective communication—written or otherwise—has been a hallmark of quality coaching for more than 50 years. What is surprising is that most organizations default to other means (surveys, three-in-a-car field rides) to gauge the quality and effectiveness of their field coaching when an invaluable source of insight—field coaching reports—resides literally at their fingertips.

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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