

**LTEN<sup>®</sup>2023**

**FOCUS  
FORWARD**

**Welcome and Thanks for Attending**

# LTEN<sup>®</sup>2023



## Advancing Development of a Coaching Culture Using Data and Analytics

**Josh Dessent**

Sales Training Manager

*Baxter Healthcare*



# Who We Are



## Josh Dessent

Sales Training Manager  
US Hospital Product and Virtual  
Sales Training Manger  
12 Years Experience in Sales and  
Training



## Rae Ann Greibe

Associate Director Commercial  
Training  
Leads Commercial Leadership and  
Development Training Programs  
35+ Years Experience in Sales,  
Marketing, and Training

# If a coaching session isn't recorded, did it even happen?

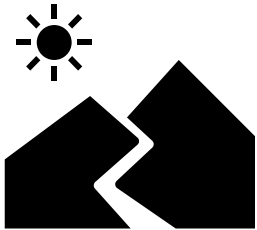


# Now Let's Get Started!

## Finding the Baseline

### Where were we at?

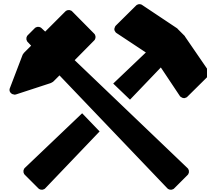
- What was our process?
- What tools did we have?
- What coaching culture did we have?



## Getting the Right Data and Tools

### What do we need?

- A Better Way to Track Coaching
- Manager Resources
- Simple and Powerful Reports



## Follow Through

### How do we keep moving the needle?

- Keep coaching top of mind
- Re-evaluations
- Prove and Share the impact



# Finding the Baseline

## Our Process

### Coaching was encouraged

- Our team's goal was 2 coaching sessions every 6 months
  - Monthly Development discussions w/ Managers
  - Corporate reminders and HR e-mails

## Our Tools

### Sales Competencies and a Homegrown system

- Coaching to Sales Competencies
  - We developed a robust outline of Sales Competencies
  - We tracked this as a tool in Salesforce.com called CCE- Coaching Commercial Excellence
  - Coaching and Development tracked in different places



# Finding the Baseline- Getting Data

## Gartner Manager Effectiveness Survey

### How does the team answer questions about Coaching?

- We surveyed all Managers and Sales Reps
  - Areas examined included Coaching Session Quality, Deal and Skill Level Coaching Effectiveness and overall Coaching Culture
  - Manager by Manager, Business by Business Scores to compare internally as well as to external benchmarks
  - Allowed us to see the areas we could improve, as well as to info we can reference and compare to later

Manager	Skill-Level Coaching Effective - Part I	Coaching Culture	Skill-Level Coaching Effective - Part II	...
5.07	6	5.78	5.78	4
6.5	6.4	6.6	6.5	
6.7	6.52	6.58	6.5	
	6.21	6.05	6.13	
	5.56	5.55	5.5	
	4.25	4.7		

# Getting the Right Data and Tools

## Dedicated Coaching Platform

### Coaching in a System Meant for Coaching

- Explored options and began a pilot program using OmniCoach
  - A true dedicated coaching platform
  - Allows for collaborative coaching conversations
  - Integrated our current competency models and rep proficiency levels
  - Track ALL Coaching in one place

## Simple Reports with Data that Matters

### Insightful and Impactful

- The ability to easily track sessions and coaching topics
  - Readily available data that is easy to understand and see, all in one place and easy to report out
  - Easily view improvement over time based on focused coaching topics
  - Enhanced proficiency scale to see incremental improvements

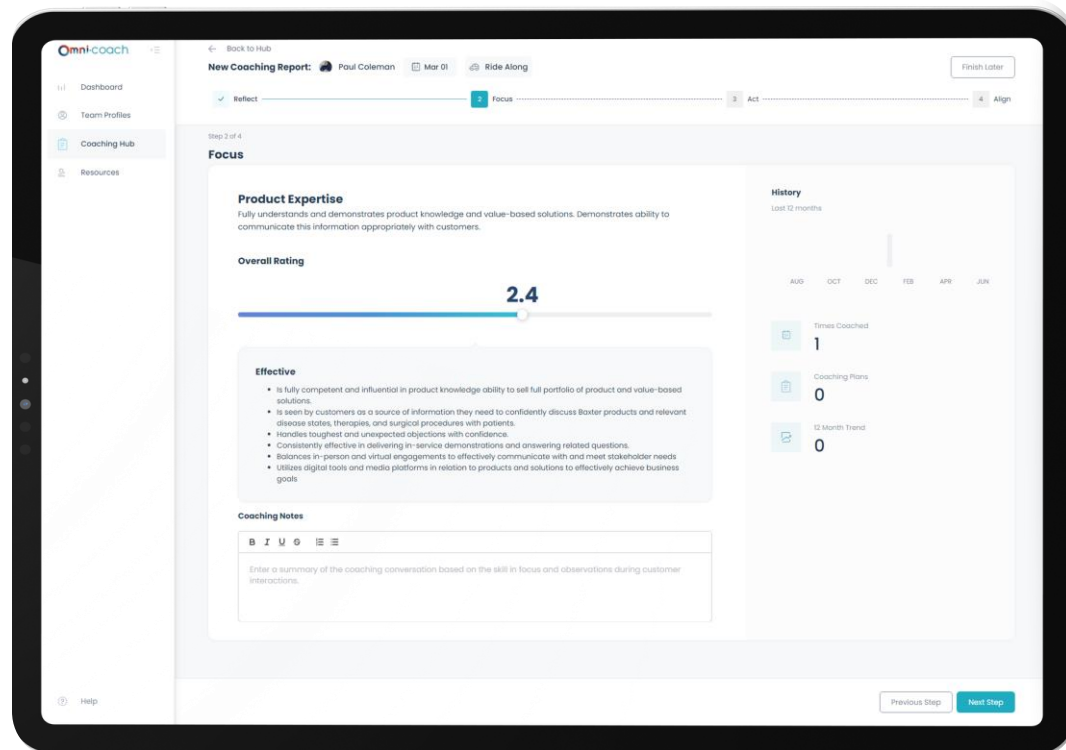




# Coaching Report Focused on Consistency

## Focus

The coaching report continues with FOCUS – adding skills and competencies with observations and coaching notes. The interactive slider rubric provides specific behaviors for each level of proficiency and promotes consistency amongst managers while supporting coaching conversations around current and desired state.



# Competency Behaviors & Proficiency Level

**New Coaching Report:** Rosie Rep | Jun 05 | ACE | Finish Later

1 Reflect | 2 Focus | 3 Act | 4 Align

### Sales Effectiveness

Takes personal accountability for achieving results and has the ability to "win" at each stage of the customer's buying process, and ultimately earn the business on the right terms and in the right timeframe.

**Overall Rating**

0

#### Basic Understanding

**Basic Understanding**

- Complies with all legal, quality, and regulatory requirements.
- Executes all steps in the sales model (i.e. pre-call planning, sales skills, closing) with periodic oversight and encouragement.
- Identifies key customer contacts for relationship building.
- Consistently uses CRM tool for territory business planning with guidance.
- Completes administrative responsibilities in a timely manner. (i.e. expense reporting, BaxU, credentialing, etc.)
- Utilizes digital tools and media platforms but demonstrates reluctance or lacks confidence in use of these tools and platforms

**History**  
Last 12 months

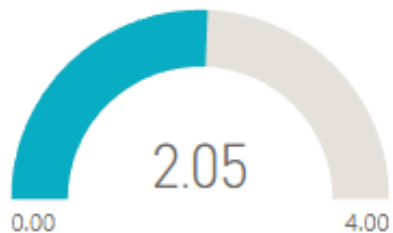
Month	Rating
AUG	1
OCT	1
DEC	0

The rubric updates as the rating changes

Previous Step | Next Step

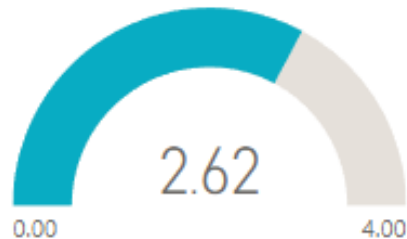
# Skill Growth

Baseline Skill Ratings



**27.96%**  
Percent Change

Current Skill Ratings

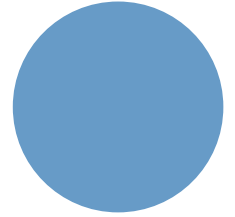


# Getting the Right Resources

## LEADx Leadership Development

### What resources can we provide our Coaches/Managers?

- On-Demand Micro Learning Content and Courses
  - AI Nudges Personalized to the Manager
  - A Coach for the Coach
  - Leadership Courses on important topics such as giving feedback, one-on-one meetings, coaching and even tips for first-time managers plus more advanced topics including employee engagement, authentic leadership, conflict management and many more.



# LEADx Features

## Personality Assessment



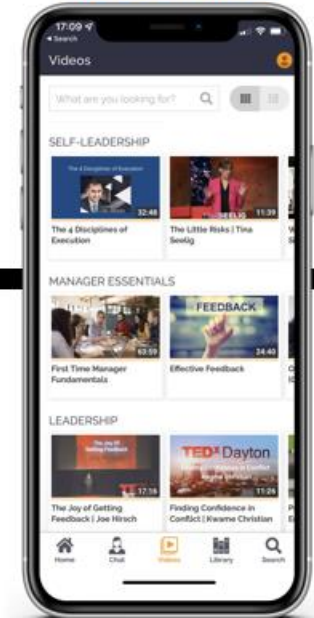
## Coaching Plans



## Nudges to Keep You On Track



## Bonus Micro-Learning & Book Summaries



# Follow Through



## Keep Coaching Top of Mind

### How can we keep the coaches coaching?

- Manager Development Program
  - Quarterly Roundtable Discussions on a LEADx Courses assigned
  - Weekly Nudges
  - Office Hours on the tools and resources we are now using
  - More Robust Manager Onboarding and Courses offered as part of our Commercial Leadership and Development program

# Follow Through

## ReEvaluate Consistently

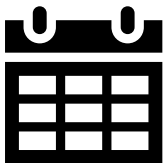
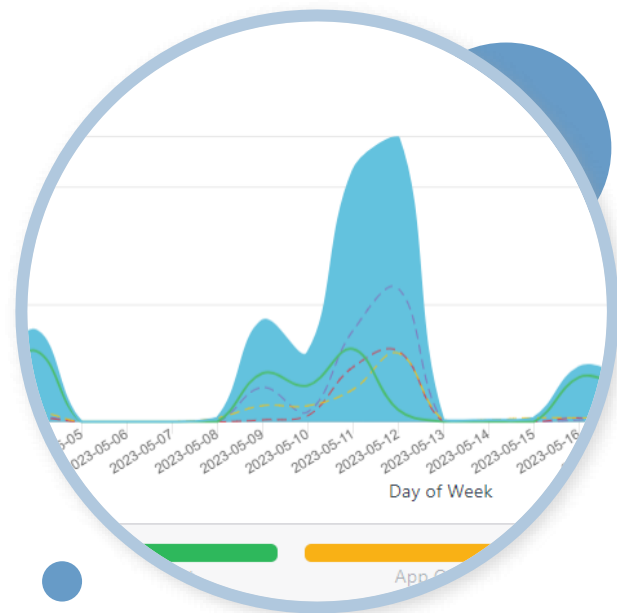
### Monitor the Usage and Level Set

- Check in and Check Often
  - Monthly/Quarterly
  - What is being used, what is not?
  - Who is participating?
  - Plan to redeploy the Manager Effectiveness Survey after 1 year

## Prove and Share the Impact

### Align to Business Goals and Report Accordingly

- Alignment with Leadership is Crucial
  - Set-up a standard report cadence
  - Ask what the focus areas are; track those first
  - Any improvement is improvement
  - Consider outside circumstances

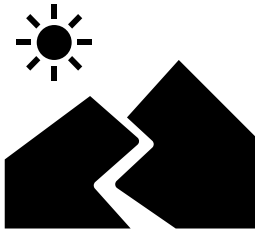


# Key Takeaways

## Know the Starting Point

### Where are you at?

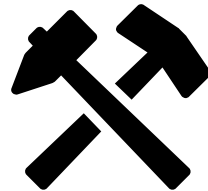
- What is your process?
- What tools do you have?
- What kind of coaching culture do you have?



## Implement a System that Works for You!

### What do YOU need?

- The tools for the job
- The right resources
- Simplicity



## Follow Through Relentlessly

### How do you keep moving the needle?

- Keep coaching top of mind
- Re-evaluations
- Prove and Share the impact





# Tell Us How We Did

## Take One Minute to Share Your Feedback

### From the app:

1. Select this Workshop
2. Click on Survey to Complete

Every Workshop Survey you submit enters you into a daily drawing for **one of three \$25 Amazon gift cards!**

A screenshot of a survey form titled "LTEN Annual Conference 2023". The form includes a home icon, a "Session Name" field, a question "How valuable did you find the information presented at this session?" with a rating scale from "Poor" to "Excellent" (represented by five stars), a question "What information in this session was most useful to you?" with a text input field, and a question "What would have made this session better?" with a text input field. A "Done" button is at the bottom, and a "Privacy Policy" link is in the bottom right corner.

LTEN Annual Conference 2023

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Session Name

How valuable did you find the information presented at this session?

Poor      Excellent

☆ ☆ ☆ ☆ ☆

What information in this session was most useful to you?

What would have made this session better?

Done

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