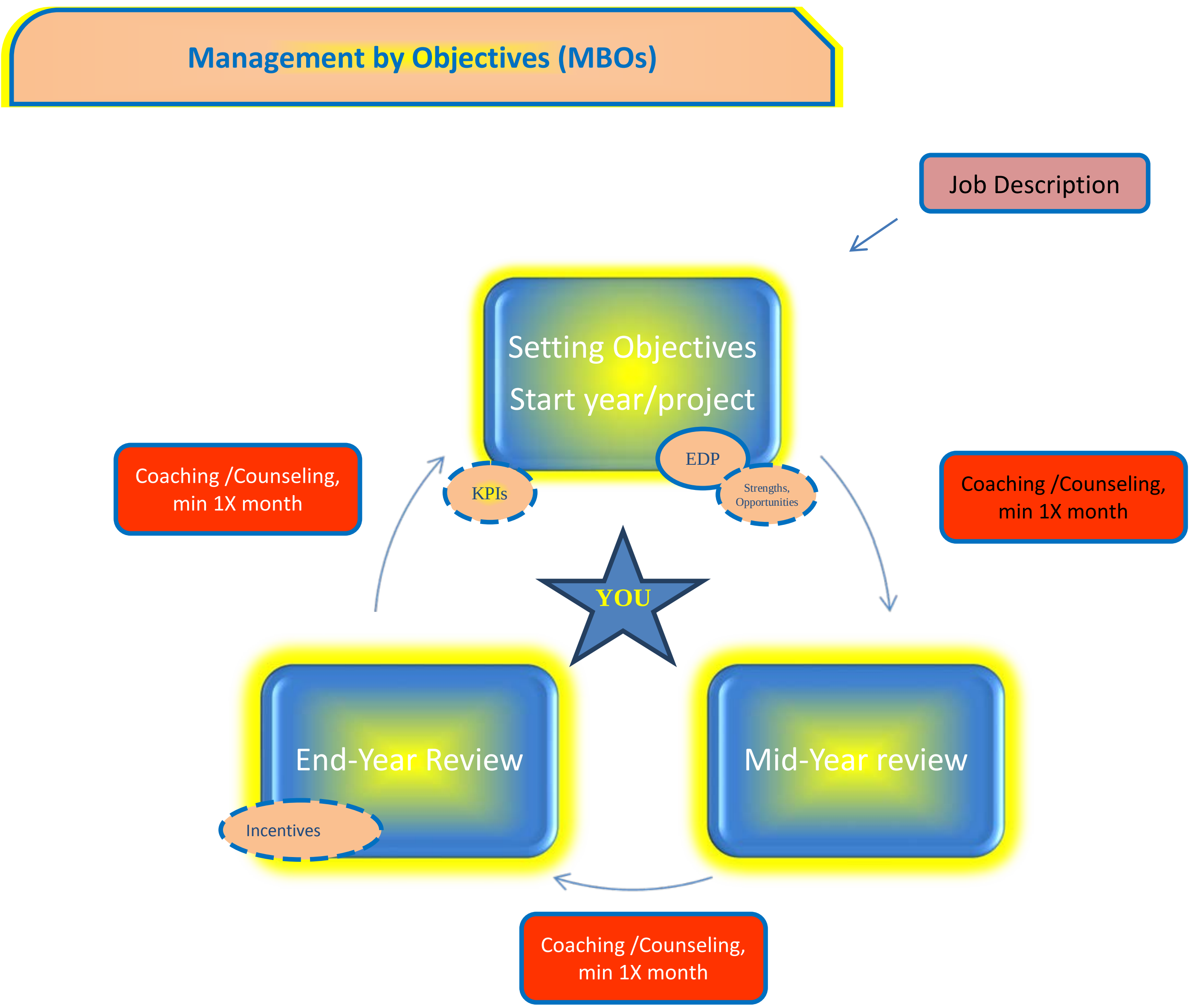
The Management by Objetives module consists of three sections:

- Setting Objectives
- Performance Reviews
- Incentives

Management by Objectives is a critical component of managing and coaching field staff. The other components, coaching, field visit management and counseling are explained in their respective modules.

Management by Objectives and Employee Development Overview:



Setting Objectives

Purpose

Define Management by Objectives, SMART Objectives and Key Performance indicators.
Explain how objectives are determined, how performance is measured and why this process is important.
Provide examples of MBOs for PSI field reps and PSI supervisors.

In this module, you will find:

- Definition of MBOs
- What are SMART Objectives and what should they be aligned with?
- What are Key Performance Indicators?
- PSI Representative MBOs Example
- PSI Supervisor MBOs example
- Post-training activity: Write your own MBOs as well as your Field Rep MBOs
- Long-term recommendations

After completing this module, you will be able to:

1. Define Management by Objectives, SMART Objectives and Key Performance Indicators (What and How leadership behaviors?)
2. Understand and explain the importance of MBOs
3. Draft SMART Objectives for yourself and your staff
4. Develop Tactical Plans
5. Assess colleagues behaviors using performance anchors

What?

Objectives:

What is an objective? A specific result that a person or system aims to achieve within a time frame and with available resources. Objectives underlie all planning and strategic activities and serve as the basis for evaluating performance.

In order to be used effectively, objectives must be SMART:

Specific

The goal must be clear and unambiguous. To make goals specific, they must tell a team exactly what is expected, why is it important, who's involved, where is it going to happen and which attributes are important.

A specific goal will usually answer the five "W" questions:

- What: What do I want to accomplish?
- Why: Specific reasons, purpose or benefits of accomplishing the goal.
- Who: Who is involved?
- Where: Identify a location.
- Which: Identify requirements and constraints.

Measurable

It is necessary to have concrete criteria for measuring progress toward the attainment of the goal. If a goal is not measurable, it is not possible to know whether a team is making progress toward successful completion. Measuring progress is supposed to help a team stay on track, reach its target dates, and experience the sense of achievement that will drive continued effort required to reach the ultimate goal.

A measurable goal will usually answer questions such as:

- How much?
- How many?
- How will I know when it is accomplished?

Attainable

It is important that goals that are realistic and attainable. While an attainable goal may stretch a team in order to achieve it, the goal is not extreme. That is, the goals are neither out of reach nor below standard performance, as these may be considered meaningless. When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them.

An attainable goal will usually answer the question:

- How: How can the goal be accomplished?

Relevant

It is important to choose goals that matter. A bank manager's goal to "Make 50 peanut butter and jelly sandwiches by 2:00pm" may be specific, measurable, attainable, and time-bound, but lacks relevance. Many times you will need support to accomplish a goal: resources, a champion voice, someone to knock down obstacles. Goals that are relevant to your boss, your team, your organization will receive that needed support.

Relevant goals (when met) drive the team, department, and organization forward. A goal that supports or is in alignment with other goals would be considered a relevant goal.

A relevant goal can answer yes to these questions:

- Does this seem worthwhile?
- Is this the right time?
- Does this match our other efforts/needs?

- Are you the right person?

Time-bound

It is important to ground goals within a time frame, giving them a target date. A commitment to a deadline helps a team focus their efforts on completion of the goal on or before the due date. This part of the SMART goal criteria is intended to prevent goals from being overtaken by the day-to-day crises that invariably arise in an organization. A time-bound goal is intended to establish a sense of urgency.

A time-bound goal will usually answer the question:

- When?
- What can I do six months from now?
- What can I do six weeks from now?
- What can I do today?

What?

What is Management by Objectives?

Management by objectives (MBO) is a process of utilizing SMART objectives to align the organization with the company's goals and evaluate staff performance. Through the MBO process, staff agree to the objectives and understand what they need to do in order to successfully achieve them. These key, SMART objectives should be provided to the Representatives as early in the year as possible. They should be provided along with the Tactical Plan to help the teams with their planning efforts in their individual assignments.

MBO's should be directly aligned with:

- the key business priorities
- Performance and Learning plan
- job role (Module 2)
- incentives
- management oversight
- and field supervisions and support tools (e.g. field trip reports, Year-End Appraisals).

In an effort to support the goals of the PSI platform and ensure that Sara and her family gain access to quality health care, annual objectives (MBO's) should support the priority activities of the PSI Field Staff at every level. Priorities will change over the lifecycle of the franchise. (e.g. During times of growth, it will be important to have an MBO weighted to reflect expectations for quality recruitment of franchisees/providers.)

By setting appropriate SMART objectives that are in alignment with key PSI goals, you enable <u>yourself and your staff</u> to:

What's in it for PSI, Sara, you (rep, supervisor)?

An important part of MBO is the measurement and the comparison of the employee's actual performance with the standards set. Accomplishments should be clearly documented (refer to Module: Management by Objectives: Performance Review). Key Perfomance Indicators (KPIs) can be used to assess the employee's performance.

What?

Key performance indicators are clear descriptions of behaviors specific to each MBO

- Needs Development: behaviors that are ineffective for accomplishing objectives
- Fully Performing: consistent and effective behaviors that enable accomplishing objectives
- Outstanding: demonstration of superior skills and behaviors that enable exceeding objectives

The use of Performance Anchors in conjunction with MBO's provides a framework for the field staff employees to understand what skills and behaviors are expected of them. It can be used to provide a foundation for performance management, training curriculums, performance-based incentives, and career development. Keeping the Performance anchors (descriptors of performance) fairly high level and relatively generic enables all field staff organizations to remain ~80% consistent when differentiating employees across these skills, but allows the flexibility for each unique franchise to interpret the behaviors (e.g. each organization can uniquely define who their "Provider" (nurse, physician, pharmacist)is). This model focuses solely on the functional/technical skills. All employees are held accountable for demonstrating the leadership and adhering to compliance requirements with all PSI policies and procedures.

Assessment of performance anchors is conducted by supervisors, appropriate colleagues and other appropriate factors as indicated in the examples on the following pages.

The following are some recommendations for MBO's, weightings, and Performance Anchors for PSI Field Staff.
These MBO recommendations reflect the following choices:

- Highest weighting on the job role activities with focus on PBCC.
- Smaller Weightings on territory management and platform goals.

Example

EXAMPLE OF MBOs for PSI Representative:

Territory Management (Weighting 10%): Accountability for effectively managing the planning and administrative activities associated with a PSI territory.

Assessed by Supervisor/Manager: Completion of Provider Strategy Plans, consistent provider visit cycle, management of documentation.

Key Performance Indicators

Needs Development:
Inconsistent or non-productive use of PSI tools to manage the assignment: customer segmentation, routing, call planning, and call reporting. Administrative reports and paperwork may often be incomplete or late.

Fully Performing:
Consistent and productive use of PSI tools to manage the assignment: Customer segmentation, routing, call planning, and call reporting. Administrative reports are rarely incomplete or late.

Outstanding:
Consistent and productive use of the PSI tools to manage assignment: Customer segmentation, routing, call planning, and call reporting. Reports are always complete and timely. The rep serves as a role model to others on maintaining accuracy of planning tools and applying them in to productively manage assignment

<u>Provider Behavior Change (Weighting 70%)</u>:
Ability to positively impact behavior change across a variety of health service areas among providers in territory. Able to effectively assess providers, engage providers in dialogue that uncovers provider needs. Able to follow through on individualized provider plans to impact provider efficiency and effectiveness.

<u>Assessed by</u>: Aggregated quality scores for all providers within the territory. Expansion of providers to additional health service areas. Increased client volume among providers. Field visits with Field Reps to observe Provider Behavior Change Communications Skills.

Performance Anchors

***Needs Development**:*
Inconsistent or ineffective at demonstrating Provider Behavior Change Communications Skills during discussions with providers. Often fails make good use of provider's time. Rarely deviates from a set script to listen to the provider and gather beliefs, insight, or address provider's questions. Struggles to convey the value of products and services.

***Fully Performing**:*
Consistent and effective at demonstrating Provider Behavior Change Skills during discusssions with providers. Consistently makes good use of the provider's time through tailored, relevant discussions. Actively listens, observes, and genuinely engages in a relevant dialogue to help
the provider improve client outcomes. Clearly articulates the value of products and services.

***Outstanding**:*
Exemplar demonstration of Provider Behavior Change Skills during discussions with providers. Establishes optimal times for calls with provider and always makes good use of the provider's time through tailored, relevant discussions. Actively listens, observes, and genuinely engages in a relevant dialogue to gain an incrementally deeper understanding of the provider's goals, helping the provider improve client outcomes. Consistently creates a compelling and logical rationale for the value of products and services. Role model to colleagues for PBC.

<u>Platform Outcomes (Weighting 20%)</u>: achievement of DALYs (at a country level), other donor goals, and provider performance indicators for quality and quantity. (When starting a new franchise there are generally consistent needs across all territories for growth in the number of franchisees and the quality of care provided. As the franchise matures, the needs will sift and must be balanced to maximize productivity (e.g. the needs for provider recruitment will change, as some territories potentially become saturated while other territories still having ample opportunity/need for recruitment.) Managers and reps should define their specific business needs and goals annually within this MBO so that the reps can plan accordingly to support performance of the platform and their personal performance.

Assessed by: Country Representative

Example

Example of MBOs for PSI Supervisor/Manager

Leadership of People (Weighting 60%): Effective management of the PSI team including coaching and development execute on Provider Behavior Change

Assessed by: Direct Management with input from PSI Rep stakeholder feedback*

*Stakeholder feedback can be used to provide feedback to a Supervisor/Manager on their coaching skills and ability to effectively manage and motivate the PSI Representatives. If your country platform currently uses of a 360 degree process during performance reviews, the stakeholder feedback can be included as an additional element to the existing 360 process. Stakeholder feedback can be collected very simply by having the Management of the PSI Supervisor/Manager solicit the following feedback from the PSI Representatives:

- *How has your manager helped and supported you in your role? How has coaching been productive? How has your Manager delivered value to you on field visits?*

If appropriate, describe opportunities that have been missed.

- *What activities or approaches should your Manager continue, change or stop?*
- *Miscellaneous feedback*

Performance Anchors:

Needs Development:
Does not effectively coach, develop, model, assess and reinforce expected behaviors for Representatives; does not build high trust environment. Their Representatives rarely demonstrate improved skills and knowledge. Does not maintain own knowledge of products, services, or PBC standards. Misses opportunities to provide constructive feedback for below standard performance and/or to reward and recognize improvement; is ineffective in coaching approach

Fully Performing:
Coaches, develops, models, assesses and reinforces expected behaviors for Representatives. Their Representatives demonstrate improved skills and knowledge. Actively develops and maintains own critical knowledge of products, services, and models PBC standards to Reps. Creates tailored coaching and training plans that provide

appropriate guidance as Representatives learn to independently apply new knowledge and skills; shows a genuine interest in the development of a strong knowledge and skill base of each person. Actively and regularly monitors Representatives' performance on the job and creates informal opportunities to observe, assess, and reinforce the Representatives outside of the Field Trip.

Outstanding:
Creates a trusting environment and a coaching relationship. Their Representatives demonstrate improved skills and knowledge resulting in consistent top performance, and recognition from peers. Serves as a resource and role model to colleagues (e.g. coaching, Customer Interaction, Marketing Strategy); Coaching is tailored to the individual; consistently rewards and recognizes increasingly higher levels of performance while providing appropriate constructive feedback and consequences when improvement is necessary. Consistently monitors performance and teaches the representatives to independently self-assess and adjust their own behavior as needed; proactively maximizes formal and informal opportunities to assess, reinforce and monitor Representatives' application of knowledge on the job and their own coaching effectiveness.

Business Planning (Weighting 20%): Effective utilization of the PSI staff to meet business needs.

Assessed by: Direct Management with input from the PSI Rep stakeholder* feedback

Performance Anchors:

Needs Development:
Did not effectively plan and manage assignment activities and resources (budgets, field visits). Demonstrates inconsistent leadership in activities that support growth of assigned franchises and products through PBC. (tactical plan development, Therapeutic Task Force activities). Inconsistent in ability to collaborate with local other functional areas within PSI to maximize franchise business and PBC (Marketing, MIS, Quality Officers, Training)

Fully Performing:
Effectively plan and manage assignment activities and resources. Demonstrates effective leadership in activities that support growth of assigned franchises and products through PBC. (tactical plan development). Effectively collaborates with local other functional areas within PSI to maximize franchise business and PBC (Marketing, MIS, Quality Officers, Training)

Outstanding:
Demonstrates outstanding leadership in planning and managing assignment activities and resources to maximize business results. Demonstrates exemplary leadership in activities that support growth of assigned franchises and products through PBC. Never misses an

opportunity to collaborate with local other functional areas within PSI to maximize franchise business and PBC (Marketing, MIS, Quality Officers, Training)

Platform Outcomes (Weighting 20%): achievement of DALYs (at a country level), other donor goals, and provider performance indicators for quality and quantity.

Assessed by: Country Representative

Tactical Plans

Once MBOs and their weightings are set, a Tactical Plan can be developed. A Tactical Plan lists out the tactics you will use to reach your MBOs. See Example Tactical Plan at the end of this session.

The tactical plan provides the representatives and supervisor/managers with clear direction, outlining a comprehensive plan of priorities, objectives, and activities by health area that will ensure that the platform meets their intended goals for the upcoming 6 months or 12 months. The tactical plan should align with the MBOs. During coaching interactions and business reviews, the tactical plan helps ground the discussion around the representatives' progress regarding activities to drive the franchise business and donor requirements. It keeps the field team moving in a coordinated fashion, which supports effective planning, implementation, and evaluation. Updates to the tactical plans will largely be determined by the changes in the products, services, and donor requirements associated with a given franchise.

Post-training activities: HOW to apply Management by Objectives:

Within one week of completing this module, complete the following activities:

1. **Draft your MBOs and Tactical Plan using the example as a guide.**
2. **Working together with your Field Reps, draft Field Rep MBOs and Tactical Plan. Include descriptions for all three performance anchors and select the performance anchor that best describes their current behaviors with a brief explanation.**

Assignment Due Date: Enter the date one week from today here and mark your calendar

Within one month of completing this module, complete the following activities:

1. Meet with your manager to discuss, agree to and finalize your MBOs.
2. Meet with your direct reports to discuss, agree to and finalize MBOs.
3. Develop Tactical Plan for yourself with your manager.

4. Develop Tactical Plan with direct reports.

On an ongoing basis:

1. Monitor the performance anchors of yourself and your staff.
2. Ensure that MBOs are in alignment with PSI and franchise priorities and if there is a need to modify them, please do so.
3. Draft MBOs for any new hires and discuss with them individually.
4. Complete Tactical Plan for each Representative.
5. Review progress against Tactical Plans during each Field Visit and Performance Review.

Resources
Tactical Plan Example

Performance Reviews

Purpose

Explain the Performance review process
Describe how assessments of colleagues should be conducted and how feedback should be provided
Show why the performance review feedback is critically important

In this module, you will find:

- The Performance Review Process: What, When, Who
- The importance of giving feedback
- How to conduct performance assessments
- Examples of Performance Review
- How to give feedback

After completing this module, you will be able to:
1. Conduct effective performance reviews
2. Provide feedback in a constructive manner

What?

It is recommended that a mid-year and year-end formal performance evaluation be completed on each Field staff employee. It provides a complete summary of employee's performance over the 6 month and 12 month timeframe. If Supervisors/Managers are working with their Representatives on a monthly basis and completing field coaching reports, the written summary is relatively easy and provides written documentation of results, outcomes achieved, skill strengths and areas for improvement.

How to assess colleagues

In order to assess your colleagues you should utilize hard data such as sales figures as well as provider and other stakeholder feedback. Coaching reports (these will be discussed in the Coaching module) are also useful in assessing your colleagues.

2 examples of assessments /feedback
Supervisor180 feedback- peers, team, boss

Example

Employee Name:	
Title: **PSI Representative**	
Manager Name:	
DIV/ORG/Dept:	

The MBO Performance Summary is intended to provide clarity and alignment between PSI-Representative and their Supervisor/Manager on objectives and expected deliverables by the employee during the performance year.

OBJECTIVE (clearly state what, how and when)	WEIGHT
➢ **Provider Behavior Change (70%):** Ability to positively impact behavior change across a variety of health service areas among providers in territory. Conduct Behavior Change Discussions with in alignment with approved franchise strategy and any applicable product label, with an understanding of provider beliefs; encouraging advocacy by the providers. (The aggregate of quality scores for providers within a territory could apply to this performance objective.) **How accomplished (the behaviors)** **Mid Year & Year End Results (updated by employee):** *Metric: Assessed by Manager*	70
➢ **Territory Management (10%):** Accountability for effectively managing the planning and administrative activities associated with a PSI territory. **How accomplished (the behaviors)** **Mid Year & Year End Results (updated by employee):** *Metric: Assessed by Manager*	10
➢ **Platform Outcomes (DALY)** Achievement of DALY's at the country level or other country goals. **How accomplished (the behaviors)** **Mid Year & Year End Results (updated by employee):** *Metric: Assessed by Manager*	20

STAKEHOLDERS – List several people who can provide valuable feedback on your performance (e.g., direct reports, peers).

EMPLOYEE SIGNATURE:	DATE:

Example

Employee Name:
Title: **PSI Supervisor**
Manager Name:
DIV/ORG/Dept:

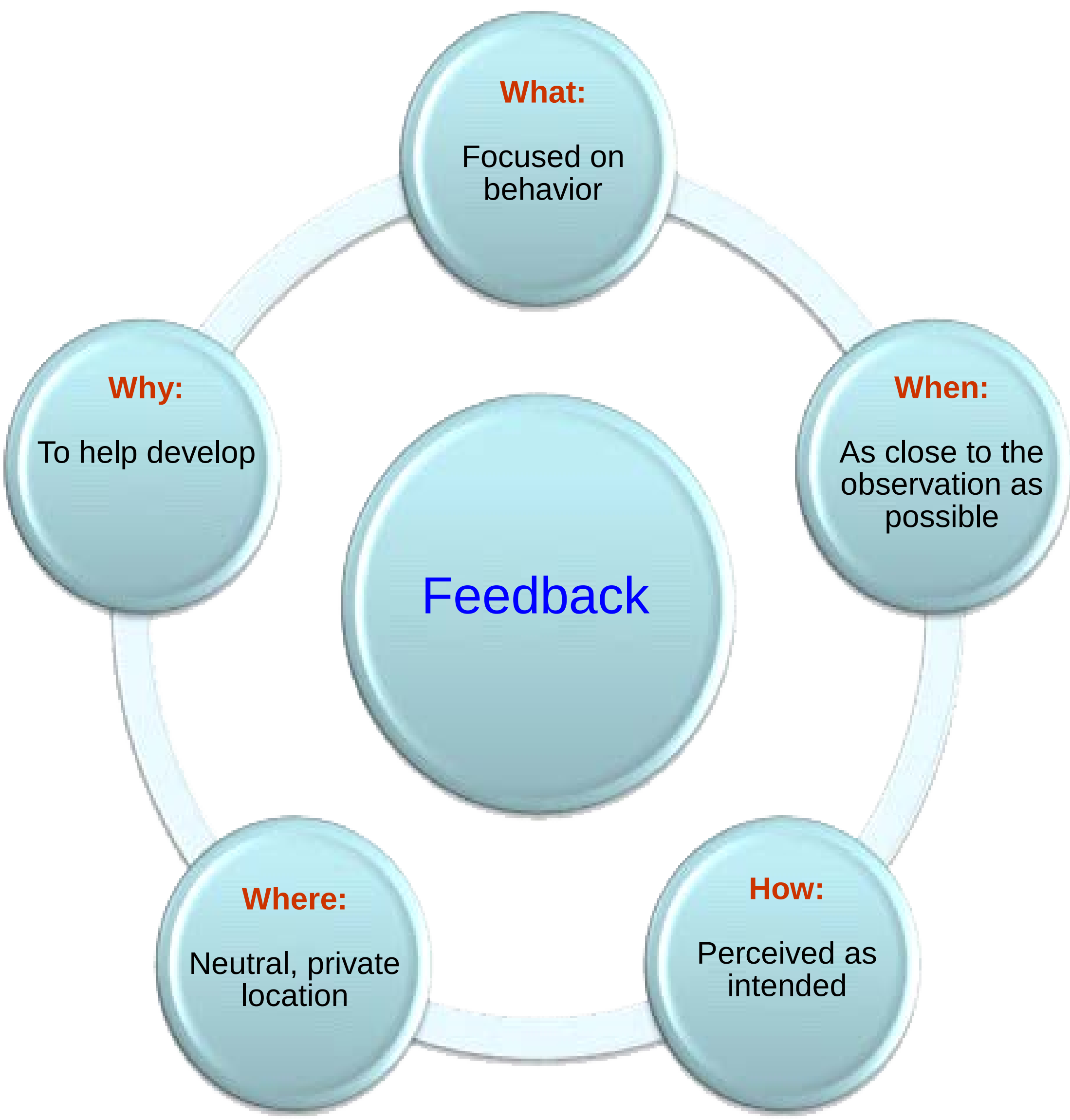
MANAGER SIGNATURE:	DATE:

The MBO Performance Summary is intended to provide clarity and alignment between PSI-Representative and their Supervisor/Manager on objectives and expected deliverables by the employee during the performance year.

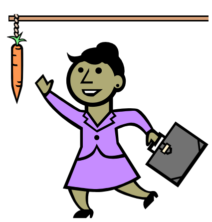
OBJECTIVE (clearly state what, how and when)	WEIGHT
➢ **(70%):** **How accomplished (the behaviors)** **Mid Year & Year End Results (updated by employee):** *Metric: Assessed by Manager*	70
➢ **(10%):** **How accomplished (the behaviors)** **Mid Year & Year End Results (updated by employee):** *Metric: Assessed by Manager*	10
➢ **How accomplished (the behaviors)** **Mid Year & Year End Results (updated by employee):** *Metric: Assessed by Manager*	20

STAKEHOLDERS – List several people who can provide valuable feedback on your performance (e.g., direct reports, peers).

EMPLOYEE SIGNATURE:	DATE:
MANAGER SIGNATURE:	DATE:


Feedback
What:
Focused on behavior
When:
As close to the observation as possible
How:
Perceived as intended
Where:
Neutral, private location
Why:
To help develop

Incentives



Purpose

To explain the importance of incentives and show how an appropriate incentive plan can be developed.

In this module, you will find:

- Description of monetary incentives (?), bonuses and non-monetary incentives
- Examples of incentives for PSI representatives and PSI managers
- Recommendations

After completing this module, you will be able to:

1. Explain what incentives and bonuses are
2. Understand what types of incentives should be awarded in different situations
3. Develop and implement an incentive plan for your staff

Both incentives and bonuses enhance performance and improve the return on investment of having costly field staff, PSI Reps and Managers. If designed well, they can have considerable impact on platform performance. Incentives should align with and support the MBOs for the field staff, and follow the same recommended weighting.

Supervisors/Managers Incentive Plan is an aggregation of their staff's performance, including all of the providers and their quality scores.

Incentives:

Incentives are forward focused motivators that encourage employees to behave in a certain way. They can be described as any factor (financial or non-financial) that enables or motivates employees to take a particular course of action. Incentives are based on individual's performance against set targets, and therefore it's recommended that employee incentives are tied directly to provider performance regarding both sets of indicators:

- Quality (adherence to guidelines and protocols)
- Quantity (volume of products and/or services provided to clients).

What?

Bonuses:

Bonuses are payments - over and above a salary - given to an employee as a reward. They are usually based on profits (Daly's for PSI) and are retroactive, typically based upon annual performance. Some countries have used a target bonus in the range of a one-month-salary (13^{th} month salary).

There are many compelling reasons to introduce incentives which encourage PSI Reps to work towards the desired output of changing clinical practice and provider behaviors.

Other incentive options:

Due to the important focus of provider behavior change to ensure that franchise providers are operating in a high quality manner, both effectiveness and efficiency, it is recommended to institute a short term or "on the spot" incentive. Managers are allotted a pool of points that have a cash value. At their discretion, managers can award points to representatives during field visits who demonstrate high quality provider behavior change interactions or exemplary teamwork with PSI colleagues to support the business. In any behavior change it is important to reinforce and reward early examples in order to encourage ongoing behavior. As representatives accumulate points over time, they can exercise the points by purchasing an item from a catalogue or website like Amazon.com.

Aside from the points system, there are other forms of non monetary incentives. For example:

- Recognition of top performing PSI Representatives in Social Cast
- Gift Certificate
- Country Level awards and recognition
- Congratulatory Letters from PSI Leadership
- Additional vacation day

Example

Exa*mple of a PSI Representative Incentive Plan:*

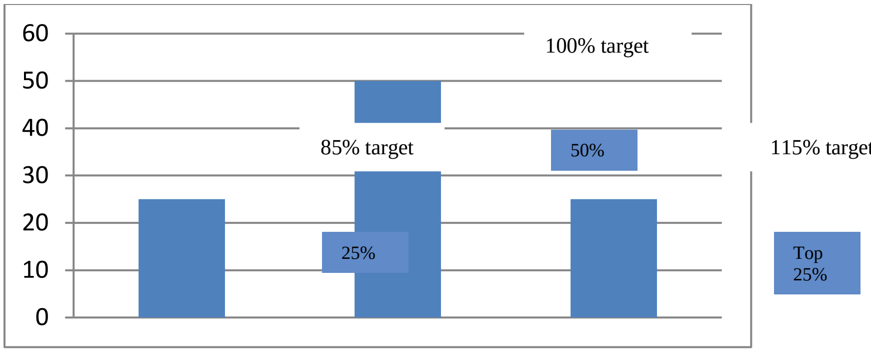
- 80% weighting on job role objectives (MBO Assessed by Manager):

    10% weighing on Territory Management
    70% weighting Provider Behavior Change skills and
    improvement in provider quality scores over the year.

- 20% weighting on platform performance (achievement of DALYs, donor goals, volume indicators, etc)

    Final year-end differentiation of PSI Representatives:

    Based upon their performance in these two objectives,
    Representatives can be placed into 3 performance buckets
    (bell-shaped curve)
    25% of team 115% of target bonus
    50% of Team 100% of target pool
    25% of team 85% of target pool



Year End Differentiation for PSI Representatives

Note: In some cultures this type of forced-ranking differentiation program linked to bonus may not be socially acceptable

Example

Example: if the country meets the DALY goal, then there is a $100 bonus.

- Country level discretionary funds could be utilized to fund this type of incentive.
- This incentive encourages team work and best practice sharing among all Country level PSI staff.
- You can choose to have an annual or semi-annual incentive plan. The goal is to have a program that is clear and consistently communicates what is being assessed and measured and when.

Example

Example: Assume that you are a PSI Supervisor/Manager and you have the following three PSI Representatives:

Rep 1: Strong territory management behaviors. Plans on all providers. Observed good PBCC skills on field visits. Quality scores increased 20% in last 6 months, Client volume and breath of health service areas offered by providers increased by 30%.

Rep 2: Territory management is average, some reports are completed on time, others have been late. Struggles with PBCC skills. Quality scores increased 5% in the last 6 months. None of Representative's providers have expanded into new health service areas.

Rep 3: Strong territory management behaviors. Plans completed on most providers. Observed strong PBCC skills on field visits. Quality scores increased 10% in last 6 months, with a 20% increase in breadth of health services provided and client volume.

As a PSI Supervisor/Manager, where would you place these 3 PSI Representatives for the purposes of incentive payout?

Suggested Answer:

Rep 1: Top bucket 125% payout
Rep 3: Middle bucket 100% payout
Rep 2: Bottom bucket 85% payout

Note: Compensation plans are designed to compensate employees for appropriate efforts performed in compliance with PSI policies and procedures. Employees will only receive incentive compensation for business results attained while operating within PSI policies and procedures.

Example

Example of a PSI Supervisor/Manager Incentive Plan:

The PSI Supervisor/Manager Incentive Plan is as follows:

- 80% weighting on job role activities:

    20% weighting on Business Planning (this will include an assessment of stakeholder feedback from the PSI Representatives on your team)

    60% weighting Leadership of People including coaching on Provider Behavior Change skills and improvement in provider quality and quantity scores.
    This includes Performance Management (If performance of a Rep does not meet standard expectations, remediation plans and actions are implemented to improve performance).

- 20% weighting on performance of the platform (achievement of DALYs, donor goals, etc)

As PSI gains more experience with financing mechanisms and mobile health, there may be opportunities to include pilots in both of these areas within the PSI rep or Manager MBOs and Incentive Plans.

Tactical Plan - 2012			
MBO Weighting	**MBO & Tactics**		**Timing / Metrics**
10%	**Territory Management**		
	Recruitment of Franchisess in each territory		10% growth in 2012 (2-3 providers)
	Consistent and productive use of PSI tools to manage the assignment: Customer segmentation, routing, call planning, and call reporting.		**Manager Oversight**
	Routing Plans	Monthly	
	Activity Progress Report	Monthly	
	Provider Tracker At- a- Glance	Daily update / monthly to manager	
	Provider Visit Notes	Daily - after each call	
	Provider Call Planning Strategy	Updated as needed	
	Health Facility Profiles	Updated as needed	
	Mid-Year Review / Year-End Review	Annually	
70%	**Provider Behavior Change Discussions**		
	Support productive business relationships between providers and PSI.		Observed, coached around and documented by Manager (FTRs, business reviews)
	Engage in PBC interactions with providers, demonstrating a high level understanding of products, Services, guidelines and disease		
	Utilize job aides, provider incetives, and other, resources/solutions to drive PBC.		
	Plans and implements tailored calls forr each provider segment, based the franchise goals.		
	Move providers along the adoption continuum,……		Atttainment of Franchise goals: Sales and DALY
	Franchise Priorities		
	Placeholder for 2-3 top franchise business goals and objectives prioritized across all the platfroma products /sercies and expansion goals.		Manager oversight (include specific metrics and timing)
	Placeholder for 2-3 top franchise business goals and objectives prioritized across all the platfroma products /sercies and expansion goals.		
	Plalceholder for 2-3 top franchise business goals and objectives prioritized across all the platfroma products /sercies and expansion goals.		
	Family Planning / Reproductive Health		
	Key Messaging for providers (1-4 messages)to align provider beliefs and practice patterns (PBC)		Manager oversight (include specific metrics and timing)
	Key Tactical activities for field reps (eg launch new job aides/client case discussion profiles, Key Opinion Leader Activities, Educational Programs, etc..)		
	Malaria		
	Key Messaging for providers to align provider beliefs and practice patterns		Manager oversight (include specific metrics and timing)
	Key Tactical activities for field reps		
	TB		
	Key Messaging for providers to align provider beliefs and practice patterns		Manager oversight (include specific metrics and timing)
	Key Tactical activities for field reps		
20%	**Platform Outcomes**		
	Facilitate/coordinate HQ interactions with providrs, utilizing all available channels to ensure the most productive interaction.		Manager oversight and Stakeholder feedback
	Work productively with PSI counterparts (sales and quality officers) to provide input and assistance in meeting the objectives with assigned clinics and providers		
	Demonstrates strong integrity and ethics in external and internal interactions.		

Coaching

Purpose

Explain what coaching is and why it is so critical to driving the business

Explain the supervisor's role as a coach and provide guidance on how to coach your staff

In this module, you will find:

- An introduction to the supervisor's responsibilities for driving the business
- The three roles of a supervisor and what each one entails
- What is coaching and why should we do it?
- How to coach: the three steps; observation; a guide on giving feedback
- Coaching resources and examples
- Key performance indicators for coaching

After completing this module, you will be able to:

1. Develop coaching plans for each of your staff members
2. Utilize coaching resources to assist you in the coaching process
3. Coach! ☺

Background

The Supervisor's Role in Driving the Business: An Introduction

It is important that teams are focused on and capable of executing activities that drive the business and that are aligned with PSI's priorities. Supervisors of PSI staff are responsible for defining these activities and ensuring that they are being executed effectively. This includes equipping their teams with the right resources, networks and skills to carry out these activities successfully. Supervisors must also support their staff to make choices that reflect PSI priorities. In order for supervisors to be able to fulfill these responsibilities, they must allocate a major, pre-defined portion of their time to supervision of their staff (see Management by Objectives module).

Taking a Step Back: The Three Roles of a Supervisor

A Supervisor has several critical roles to fulfill. These include being a Leader, a Manager, and a Coach. Although there are differences between them, they are complementary, and all three are required in order for a supervisor to be effective.

When fulfilling each role, the supervisor should be focused on the same three primary tasks:

1. Deciding what needs to be done
2. Creating resources, networks, and relationships to achieve the goals
3. Ensuring that people actually do the work

The difference in each of these roles is its key focus.

- The leader's focus is change, motivating the team and explaining why change is necessary.
- The manager's focus is complexity, making sure everything is in place to get the job done. This includes looking at data, team structure, tools needed, networks, and relationships.
- The coach's focus is capabilities, developing the team. Supervisors agree with their staff on "what *good* looks like," they observe performance, give honest feedback, and help develop skills.

What?

What is Coaching?

In this module, we will focus on the coaching role of a supervisor. Let's start with what is coaching and why we should do it.

Coaching is an ongoing career development process in which supervisors and staff (for example, field representatives) work together to develop and effectively apply job-related skills. Coaching is facilitated through a partnership where there is an agreement on goals and commitments; it is not one person lecturing another. It is personalized, customized, usually done one-on-one over a period of time with a specific business objective in mind.

Coaching has been commonly used to develop employees and has generated positive business outcomes. It is viewed as a credible, effective way to improve company performance. In a survey conducted by the International Coaching Federation, coaching was reported to drive significant improvements in the following areas:

- Self-esteem/self-confidence
- Relationships
- Communication skills
- Interpersonal Skills
- Work performance

WIIFM? What's in it for me?

The resources and improvements gained from coaching contribute to the achievement of the staff's goals, the supervisor's goals, PSI's goals, and ultimately, improved life for Sara. If we keep this in mind, it is clear why we have to continuously coach our staff.

How?

How to Coach: An Introduction

There are three major parts to coaching—planning, implementing, and evaluating

- **Planning** for coaching: review data, assess performance readiness (based on staff's demonstrated ability and willingness), and identify the task focus for the coaching conversation.
- **Implementing** coaching: observe and assess performance, ask the Representative for his/her view of performance, offer feedback, explore ideas, and commit to action.
- And finally, **to evaluate** the Representative's ongoing progress, document observations and follow up as agreed.

Observation: Although it is important for Managers to observe the on-the-job performance of representatives during their PBCC, coaching is not a single event and is not limited to co-visits. Teams also need coaching on territory management, data analysis, medical knowledge, etc.

Feedback: A key skill in the process of coaching is providing feedback about performance. Feedback can serve to reinforce, enhance, or correct behaviors demonstrated on the job. The figure below is a guide to providing successful feedback.

The Coach O.F.T.E.N. Guide helps with both planning and implementing the coaching conversation.

Coach O.F.T.E.N

Open:	Establish purpose and tone; ask for their view
Focus:	Focus on 1-3 skills to discuss
Transition:	Offer feedback; describe observable behaviors and benefits
Engage:	Explore ideas for improvement and development
Next Steps:	Commit to action

Example

Example of coaching on a field visit:

- Prior to your field visit, review past field coaching reports to reorient yourself to the developmental needs of your employee. Review other relevant documents, such as provider quality assessments and clinic volume, provider visit averages and frequency.
- Discuss with the representative the objective of each visit prior to entering the clinic. Ensure they have a plan for that visit with the provider.
- Observe the provider interaction. Was the provider accurately segmented and prioritized? Did the representative engage in a two-way dialogue with the provider? Were barriers to change addressed, (i.e., knowledge, opportunity, ability, motivation)? Was there a commitment or were next steps achieved with the provider?
- Take time to debrief with the representative immediately following the call. Avoid the temptation to quickly move onto to the next call.
- Ask the representative for their view, "What went well? Did you achieve your objective? What would you change?"
- Keep in mind that feedback is based on observable behaviors, i.e., words/actions, what you see, what you hear, and evidence. Conversely, judgments are subjective, have personal bias, prejudices, reactions and assumptions. Always anchor your feedback in observable behaviors.
- Provide your observations, and if required, actually model them for the representative. Collectively explore additional ideas, and commit to action. Consider leveraging another member of your team who may excel in a certain area that your representative is struggling with.
- At the end of the day, debrief on the entire day. Agree with the representative on 1-2 specific areas for improvement regarding their ability to positively impact provider behavior change. Complete the Field Coaching Guide with the representative, and send a copy within the next 1-3 business days.

How?

In order to ensure that effective coaching is provided to staff, coaching should be a major part of a Supervisor’s objectives (more information in “Management By Objectives” module). Below are some suggestions for key performance indicators for coaching:

Quantitative measurements:

- How often a Supervisor goes in the field with high, middle, low performers; number of coaching days a month
- How many visits a Supervisor observes per coaching day
- What should a coaching report look like?
- How often a report should be sent to the supervisor’s Manager

Qualitative measurements:

- 360° surveys with questions on how effective coaching is perceived by direct reports
- Stakeholders feedback
- Coach the coach reporting: observations of coaching interactions by the supervisor's manager or trainer
- How the evolution of the development of the representatives is going
- How are performance issues dealt with
- Success and implementation of performance implementation plans

Resources

- Frequently Asked Questions (FAQs) about Coaching.
- Coaching Workshop Facilitation Guide
- Coaching Basics Handbook and Participant Workbook
- Sample Field Coaching Guides
- Presentation to Introduce Coaching to Field Teams
- Field Visit Management Self-learning Course

Self-Learning Questions:

- What are the three roles of a Supervisor and what does each role entail?

- What is coaching and why is it important?

- What are the three major parts of coaching? Describe what each one entails?

- What does Coach O.F.T.E.N. mean?

- How many skills should a coach focus on during a single coaching conversation?

- Provide at least one quantitative and one qualitative key performance indicator for coaching.

__Action Items:__

Within three weeks of completing this module, complete the following activities:

1. Read the Coaching toolkit
2. Read the PBCC Program Toolkit: Field Visit Management module
3. Develop a coaching workplan for each of your staff members (If you are field supervisor, these are your field representatives)
    a. Schedule monthly meetings for the entire year. If your staff are field representatives, schedule time to attend field visits with them so that you observe how they interact with their providers.
    b. Use the coaching form to plan for your co-visit. For head office staff, this could be a meeting with your staff in the office. For field staff that interact with providers, this should be a day out in the field with your field representatives. Define the objectives of your co-visit. Take note of any strengths and areas of opportunity that you have already determined from previous interactions.
    c. Conduct the first co-visit, and continue to fill out the coaching form with strengths, areas of opportunity, and follow-up actions.
4. Review your MBOs and KPIs, and ensure that they include quantitative and qualitative measurements for coaching

Due Date: Enter the date three weeks from today here and mark your calendar. 

On an ongoing basis:

1. Monthly coaching meetings/co-visits, using the coaching form. The objective should be based on the previous co-visits and the staff member's strengths and areas of opportunity.
2. When coaching course is available, attend the course and study the toolkit.

Ongoing Coaching & Feedback FAQ's

General Information

1. How do I benefit from Ongoing Coaching & Feedback?
The overall effectiveness of the feedback process is based on the frequency and quality of performance discussions. Ongoing feedback can:

- Offer opportunities to deliver/receive "just-in-time" feedback close to the time of an event or situation, when the details of performance are likely to be clear.
- Motivate employees by communicating the value of good performance.
- Provide guidance and focus for redirecting performance and aligning work with key business priorities.
- Help employees understand how they are performing against objectives, preventing major "surprises" during year-end reviews.
- Offer opportunities for employees and managers to discuss how the feedback process is working.
- Provide opportunities for employees to take corrective actions.
- Simplify the year-end review process.

2. How do I differentiate Ongoing Feedback from feedback provided during the Year-End review?
Ongoing feedback happens regularly throughout the year with frequent, formal or informal discussions between the manager and employee. Feedback provided during the year-end review is planned, more formal in nature, and typically occurs once a year. Feedback during the year-end review focuses on annual performance against all objectives.

For Managers

3. As a manager, how do I establish feedback expectations with employees?

- It's important to set aside time early in the year to discuss performance feedback needs and expectations with your employees.
- Let your employees know that performance feedback is important to you and that you'd like to set up time to give/receive feedback throughout the year.
- Inform employees that you'll regularly solicit feedback from their stakeholders to identify what's working well and where changes should be made.
- Ask your employees if there are specific areas on which they would like to receive feedback.
- Agree to meet regularly, aligning with key project milestones or give feedback immediately following a particular situation or event.
- Let your employees know that you'd like their input during your feedback discussions to ensure that you meet their feedback needs and expectations.

4. How do I collect feedback about my employees' performance and development?
Feedback may be requested throughout the year and may be gathered formally or informally by:

- Periodically contacting stakeholders (matrix managers, peers, clients, team members, etc.) who can provide meaningful information about your employee's performance strengths and areas for development.
- Take advantage of ad hoc opportunities to gather feedback, for example, during regularly scheduled project update meetings.
- If the employee is a people manager, be sure to obtain feedback from their direct reports on your employee's people management and leadership skills.

Note: If you have questions about the feedback collection process given local privacy laws, please contact your HR Business Partner.

5. How do I effectively give feedback to employees and others?

Providing feedback is one of a manager's most important responsibilities. Here are some ideas to help you get started:

- Be timely and direct.
- Be as honest as possible without getting personal.
- Describe behaviors using examples as well as the impact of those behaviors. Also, look for ways to focus the discussion by clarifying strengths and development areas within the context of objectives.
- Be focused on actions and summarize next steps. Clarify what's working well and where changes should be made. Work together to develop a plan to address any areas of unsatisfactory performance.
- Be open to feedback.

6. How do I deliver corrective feedback to employees and others?

- When corrective feedback is required, make sure you understand the root cause of the behavior that you're looking to correct.
- Share data that supports your feedback/messages and keep the discussion focused on specific ways to improve performance.
- Remain open minded, solicit and listen to the employee's point of view, and show empathy for his/her concerns.
- Ask the employee to summarize the takeaways of the meeting and next steps. Consider developing a written action plan that clearly provides the key performance concerns and specific actions that are required to address those concerns.

7. How do I give positive feedback to employees and others?

First, be sure the positive feedback you are giving describes the effective behavior taken and why it was effective. Provide positive feedback just as timely and directly as any other feedback. Also, be sure to clarify your comments so that the employee understands what you (or others) identify as his/her strengths.

8. How do I reward or recognize employees?

- Employees can be recognized for their contributions in many different ways. When in doubt, treat others as they want to be treated.
- Find out how employees prefer to be recognized to ensure consistency with their specific circumstances and individual preferences.

9. How do I solicit and receive candid feedback from my direct reports and others?

The ability to be candid is closely linked to the level of trust that exists between two people. Here are a few things that may help build trust between you and others:

- Communicate that you're seeking feedback as an opportunity to learn and develop.
- Let the person know if there is a specific area for which you want feedback.
- Listen actively, and don't interrupt, defend, rationalize, or discount.
- Ask clarifying questions.
- Summarize your understanding of what you heard and agree on the subsequent actions that will be taken.
- Thank the person for the feedback.

For Employees

10. How do I initiate Ongoing Feedback from my manager?

To initiate Ongoing Feedback from your manager, let him/her know:

- Performance feedback is important to you, and you'd like to ensure she/he consistently provides you with feedback.
- The specific areas on which you want feedback.

11. How do I effectively solicit and gather feedback about my performance and development?

Feedback may be requested throughout the year by:

- Periodically contacting stakeholders (peers, clients, team members, etc.) who can provide meaningful feedback about your performance strengths and development areas. Be sure to clarify your data/information needs and ask specific questions.
- Look to your manager and those stakeholders who have had an opportunity to observe your performance strengths.
- Taking advantage of ad hoc opportunities to gather feedback, for example, during regularly scheduled project update meetings.
- Follow up with these individuals on any action you are taking as a result of the feedback given.

12. How do I receive feedback effectively from my manager and others?

The ability to be candid is closely linked to the level of trust that exists between two people. Here are a few things that may help build trust between you and others:

- Communicate that you're seeking feedback as an opportunity to learn and develop.
- Let the person know if there is a specific area for which you want feedback.
- Listen actively, and don't interrupt, defend, rationalize, or discount.
- Ask clarifying questions.
- Summarize your understanding of what you heard and agree on the actions you'll take.
- Be open and receptive to feedback.
- Thank the person for the feedback.

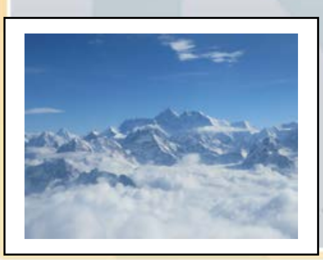
13. How do I give feedback effectively to my manager and to others?

There are many ways for you to provide feedback to your manager. Here are some ideas to help you get started:

- Be timely and direct. Share your thoughts quickly and honestly without getting personal.
- Be specific. Describe behaviors using examples as well as the impact of those behaviors.
- Be focused on actions and summarize next steps. Clarify what's working well and where changes should be made.
- Be open to feedback yourself. Ask for information about whether your performance is meeting your manager's needs and expectations.

14. How do I make the most of my feedback?
Work with your manager to identify opportunities to optimize performance strengths and work on development areas. Opportunities may include training, developmental assignments, etc. Also, communicate to others regarding what you're doing differently in response to corrective feedback, and let them know that you may check in with them to see if your performance is improving.

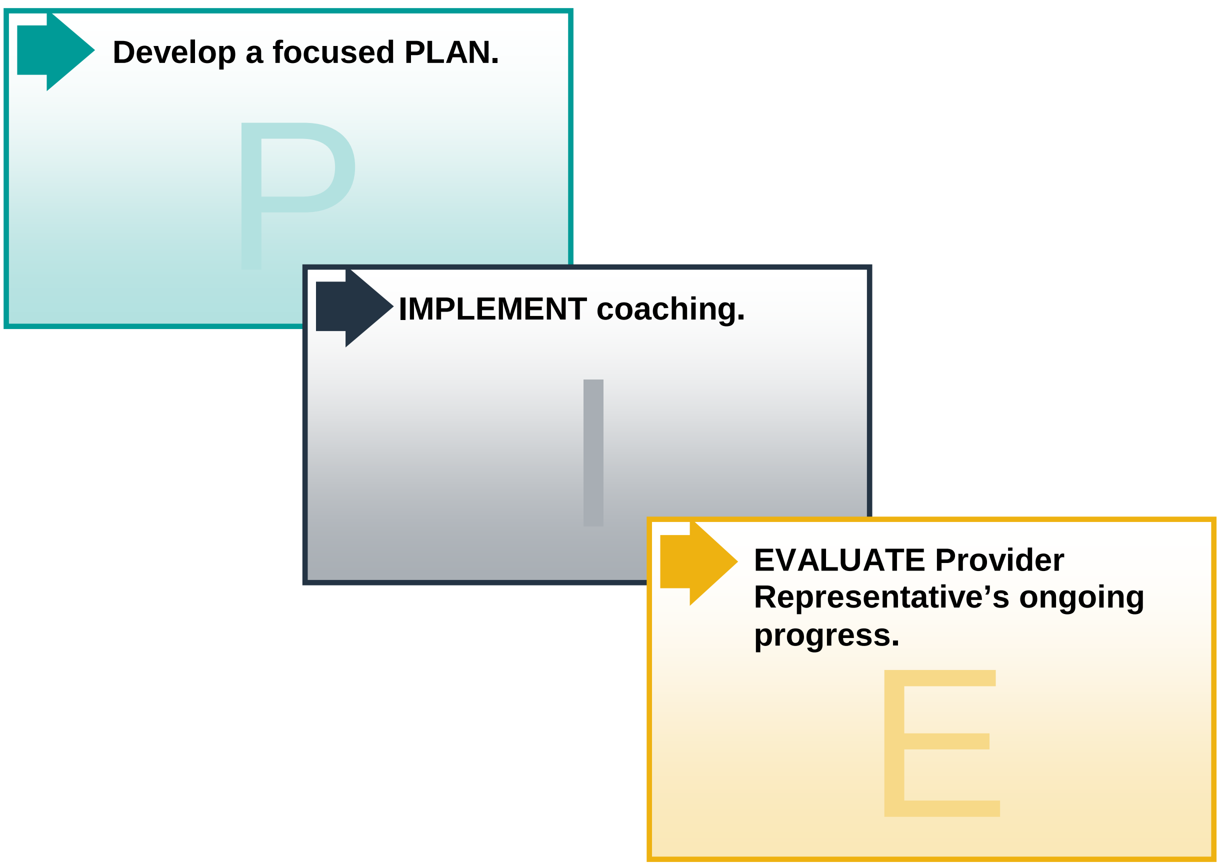
Coaching
Toolkit



Coaching: An Ongoing Process

Effective coaching is an ongoing process with each of your Provider Representatives. For each coaching conversation, you will need to develop a focused **plan**, you need to **implement** coaching, and finally to **evaluate** the Provider Representative's progress afterwards. The coaching conversation should focus directly on the Provider Representative's specific **tasks** and **behaviors**.

For each coaching conversation, you will need to:



Coaching:

Using the PLAN-IMPLEMENT-EVALUATE Framework

The process of coaching includes the need to PLAN, IMPLEMENT, and EVALUATE (PIE).

PLAN – Prepare to Coach/Observe and Assess

P

- Review action steps from the last Co-visiting Report and/or coaching conversation. Review data, action plans, and MBO's.
- Prioritize which aspects of current performance you plan to address during the coaching conversation.
- Assess the Provider Rep's Ability and Willingness to perform a specific task (Can't/Won't, Could, or Can). Plan how to match your coaching style (Directive, Participative, or Encouraging) to the Provider Rep's task-specific Ability and Willingness.
- At the beginning of the coaching conversation, discuss the Provider Representative's overall objectives (e.g., account strategy, provider discussions, specific issues, etc.).
- Observe Representative's performance with provider and/or colleagues.

IMPLEMENT – Provide Feedback

I

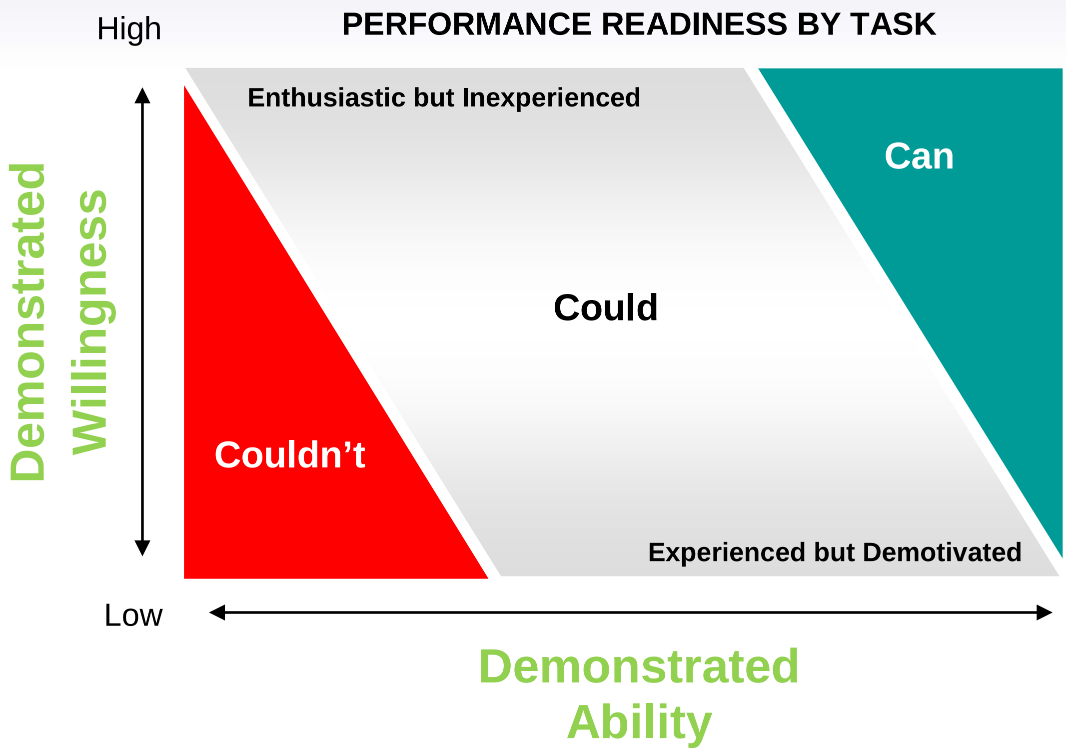
- Observe Provider Representative's performance with provider and/or colleagues.
- Offer the Provider Representative the opportunity to analyze his/her performance.
- Assess how effectively the Provider Representative demonstrated the tasks observed. Refer to performance standards/competencies for PBCC
- Focus on one to three tasks to discuss.
- Provide feedback based on observable behaviors, no judgments
- Explore ideas for getting results, improvement, and development.
- Commit to action.

EVALUATE – Establish Coaching Continuity

E

- Document action steps, milestones, and accountability for achieving performance and development objectives.
- If the coaching conversation occurs during a field visit, complete a Co-visiting Report.
- Create coaching continuity by monitoring completion of action steps and providing positive reinforcement and guidance as appropriate.
- Plan for the next coaching conversation.

Performance Readiness



When **planning** for a coaching conversation, identify the specific tasks/skills to focus on during the interaction. A Provider Representative's performance readiness can be described as a combination of demonstrated task-specific ABILITY and WILLINGNESS. Managers should be:

- **DIRECTIVE** with those who **CAN'T** or **WON'T** perform the specific task;
- **PARTICIPATIVE** with those who **COULD** perform the specific task; and
- **ENCOURAGING** with those who **CAN** perform the specific task.

A Provider Representative's performance readiness may vary by task. For example, you may need to adopt a Directive coaching style for one task and a Participative coaching style for another task.

Refer to the PBCC performance standards for skills and behaviors. The standards show people what good looks like

Performance Readiness Behaviors: What You Observe

PROVIDER REPRESENTATIVE READINESS LEVELS

<table>
<tr><th colspan="2">CAN'T/WON'T</th><th>COULD</th><th>CAN</th></tr>
<tr><td>CAN'T</td><td>Needs to Learn the Basics
• Lacks skill and experience, does not see clearly how to move forward or know what resources to draw upon.
• May be unaware of performance issue.
• Lacks confidence in own ability to build provider and internal relationships and achieve results.</td><td rowspan="2">Needs to Expand Skills (Enthusiastic but Needs Experience)
• Asks questions and seeks clarity.
• Enthusiastically takes on more than he/she can handle.
• Delivers results but may experience setbacks.

Needs to Engage (Experienced but Demotivated)
• Avoids taking initiative or avoids the Manager.
• Demonstrates ability but shows evidence of poor motivation or attitude.</td><td rowspan="2">Needs to Stretch
• Makes optimal decisions about how to get results.
• Develops fresh approaches to meeting customer needs.
• Proactively alerts you to problems and opportunities.
• Assists in the development of other Provider Representatives.</td></tr>
<tr><td>WON'T</td><td>Needs to Turn Around
• Demonstrates unacceptable performance (does not meet performance expectations) or marginal performance (barely meeting minimum expectations) on a sustained or intermittent basis.</td></tr>
</table>

MANAGER COACHING STYLE

Match your coaching style to the Provider Representative's performance readiness for a specific task. A Provider Representative's performance readiness level may vary based on his/her Ability/Willingness to perform a particular task.

DIRECTIVE	PARTICIPATIVE	ENCOURAGING
High Guidance	Balanced Guidance and Support	High Support

Manager's Coaching Style: What You Do

DIRECTIVE
High Guidance

Be Directive With Can't	Be Directive With Won't
• Provide specific direction about what and how. • Describe what they most need to learn. • Team the Provider Representative with an experienced peer and/or meet regularly to provide feedback. • Provide opportunities to practice and any training needed to build skills. • Offer encouragement and positive feedback and express confidence, when appropriate. • Check in regularly with Provider Representative.	• Clearly communicate need for improved performance against standards. • Describe consequences of failure to improve. • Closely supervise performance improvement efforts. • Contact HR and Next Level Manager. • Provide a written action plan describing specific performance expectations that must be met within a specified time frame.

PARTICIPATIVE
Balanced Guidance and Support

Be Participative With Could (Needs to Expand Skills)	Be Participative With Could (Needs to Engage)
• Ask employee how he/she would approach the situation; support employee's ideas when possible. • Modify ideas and suggest other approaches or resources, as appropriate. • Set realistic limits for employee's efforts at new tasks.	• Discuss and clarify mutual expectations with regard to initiative or "checking in." • Discuss how behavior impacts team/individual performance and provide examples. • Determine if employee needs more direction or if they can improve behavior on their own. • Explore root causes and agree to needed changes.

ENCOURAGING
High Support

Be Encouraging With Can
• Outline and clarify desired outcomes. • Let employee decide on what and how. • If asked, share ideas or best practices. • Run interference and eliminate barriers. • Continue to offer feedback.

Coach O.F.T.E.N.

Now that you're clear about what you have observed and which coaching style to use, it is time to coach your Representative. The Coach O.F.T.E.N. Guide details a suggested structure for your coaching conversation.

O
OPEN

- Establish purpose and tone
- Ask for their view

F
FOCUS

- Focus on one to three tasks to discuss

T
TRANSITION

- Offer feedback
- Describe observable behaviors, benefits

E
ENGAGE

- Explore ideas for improvement, development

N
NEXT STEPS

- Commit to action

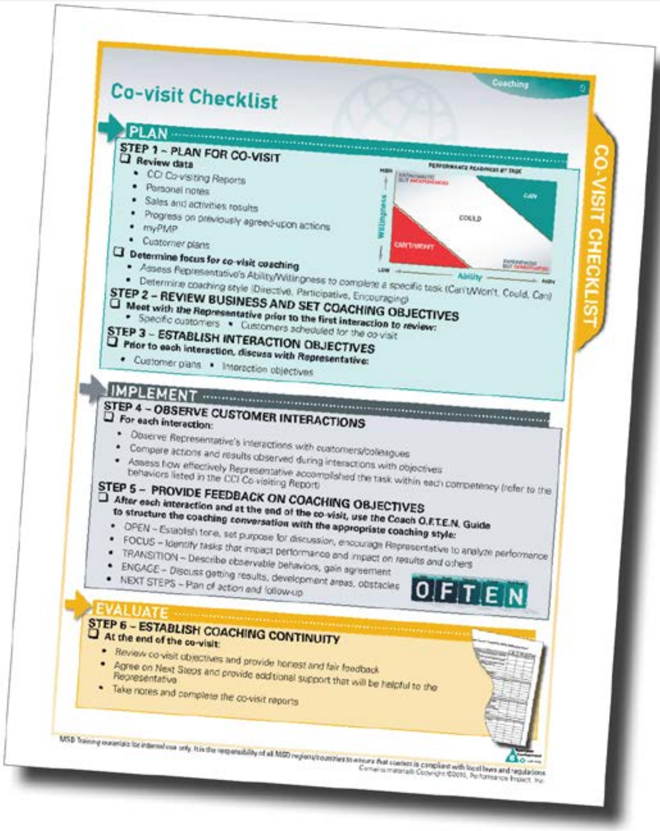
The Coach O.F.T.E.N. Guide

DIRECTIVE High Guidance	PARTICIPATIVE Balanced Guidance and Support	ENCOURAGING High Support
OPEN		
Offer the Provider Representative the opportunity to share his/her view of task performance. Review performance against standards (PBCC standards, PSI Quality Standards). Provide clear guidance about what the Provider Representative needs to learn and/or why performance needs to improve.	Offer the Provider Representative the opportunity to share his/her view of task performance. Review performance against standards (PBCC standards, PSI Quality Standards). Establish an open tone and acknowledge what the Provider Representative did well and any areas for improvement on the task.	Offer the Provider Representative the opportunity to share his/her view of task performance. Review performance against standards (PBCC standards, PSI Quality Standards). Establish an appreciative tone and acknowledge the Provider Representative's positive impact on results and relationships.
FOCUS		
Identify one or two tasks that most impact performance and the negative impact on results and others as the Focus of the coaching conversation.	Identify one or two tasks that most impact performance and the positive or negative impact on results and others as the Focus of the coaching conversation.	Identify one or two tasks that most impact performance and the positive impact on results and others as the Focus of the coaching conversation.
TRANSITION		
Describe observable behaviors and gain agreement that information/training is needed or that a problem exists.	Describe observable behaviors and gain agreement on how to take performance to the next level.	Describe observable behaviors and note any current or future challenges that could be a barrier to sustaining high performance.
ENGAGE		
Tell the Provider Representative what to do differently and how to complete or improve on the task.	Ask questions to discover what and how the Provider Representative has been getting results; solicit his/her ideas for taking performance to the next level and support them, when possible.	Learn more about how the Provider Representative is getting the desired results and develop possible solutions to any challenges or barriers.
NEXT STEPS		
Develop a plan of action for what the Provider Representative will do to improve and how you will follow up.	Negotiate a plan of action for what and how the Provider Representative will continue to achieve results, develop further, and how you will follow up.	Support a plan of action for what you and the Provider Representative will do to sustain high performance and how you will follow up.

Evaluate Ongoing Progress

As a Manager, you need to continually evaluate and document your Provider Representatives' performance against PBCC standards and objectives.

If the coaching conversation occurs during a field visit, you also need to document your performance observations in the Co-visiting Report.



Co-visit Checklist

Coaching

CO-VISIT CHECKLIST

PLAN

STEP 1 – PLAN FOR CO-VISIT

❑ Review data
- CCI Co-visiting Reports
- Personal notes
- Sales and activities results
- Progress on previously agreed-upon actions
- myPMP
- Customer plans

❑ Determine focus for co-visit coaching
- Assess Representative's Ability/Willingness to complete a specific task (Can't/Won't, Could, Can)
- Determine coaching style (Directive, Participative, Encouraging)

STEP 2 – REVIEW BUSINESS AND SET COACHING OBJECTIVES

❑ Meet with the Representative prior to the first interaction to review:
- Specific customers
- Customers scheduled for the co-visit

STEP 3 – ESTABLISH INTERACTION OBJECTIVES

❑ Prior to each interaction, discuss with Representative:
- Customer plans
- Interaction objectives

IMPLEMENT

STEP 4 – OBSERVE CUSTOMER INTERACTIONS

❑ For each interaction:
- Observe Representative's interactions with customers/colleagues
- Compare actions and results observed during interactions with objectives
- Assess how effectively Representative accomplished the task within each competency (refer to the behaviors listed in the CCI Co-visiting Report)

STEP 5 – PROVIDE FEEDBACK ON COACHING OBJECTIVES

❑ After each interaction and at the end of the co-visit, use the Coach O.F.T.E.N. Guide to structure the coaching conversation with the appropriate coaching style:
- OPEN – Establish tone, set purpose for discussion, encourage Representative to analyze performance
- FOCUS – Identify tasks that impact performance and impact on results and others
- TRANSITION – Describe observable behaviors, gain agreement
- ENGAGE – Discuss getting results, development areas, obstacles
- NEXT STEPS – Plan of action and follow-up

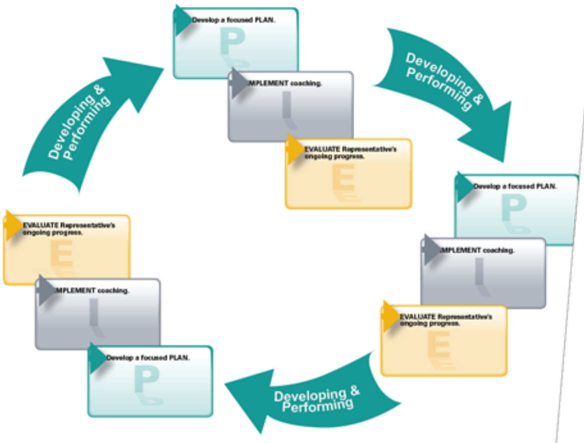
O F T E N

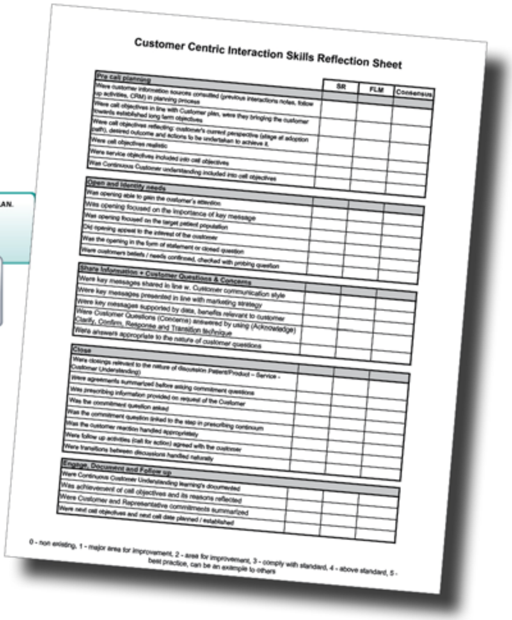
EVALUATE

STEP 6 – ESTABLISH COACHING CONTINUITY

❑ At the end of the co-visit:
- Review co-visit objectives and provide honest and fair feedback
- Agree on Next Steps and provide additional support that will be helpful to the Representative
- Take notes and complete the co-visit reports

Create coaching continuity by monitoring completion of action steps and providing positive reinforcement and guidance on an ongoing basis.





Customer Centric Interaction Skills Reflection Sheet

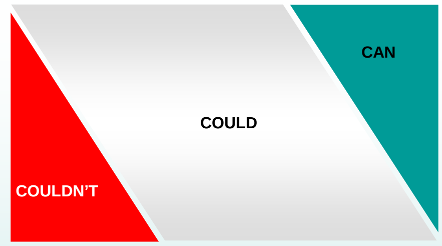
Pre call planning	SR	FLM	Consensus
Were customer information sources consulted (previous interactions notes, follow up activities, CRM) in planning process			
Were call objectives in line with Customer plan, were they bringing the customer towards established long term objectives			
Were call objectives reflecting: customer's current perspective (stage of adoption path), desired outcome and actions to be undertaken to achieve it.			
Were call objectives realistic			
Were service objectives included into call objectives			
Was Continuous Customer understanding included into call objectives			
Open and Identify needs			
Was opening able to gain the customer's attention			
Was opening focused on the importance of key message			
Was opening focused on the target patient population			
Did opening appeal to the interest of the customer			
Was the opening in the form of statement or closed question			
Were customers beliefs / needs confirmed, checked with probing question			
Share Information + Customer Questions & Concerns			
Were key messages shared in line w. Customer communication style			
Were key messages presented in line with marketing strategy			
Were key messages supported by data, benefits relevant to customer			
Were Customer Questions (Concerns) answered by using (Acknowledge) Clarify, Confirm, Response and Transition technique			
Were answers appropriate to the nature of customer questions			
Close			
Were closings relevant to the nature of discussion Patient/Product – Service - Customer Understanding)			
Were agreements summarized before asking commitment questions			
Was prescribing information provided on request of the Customer			
Was the commitment question asked			
Was the commitment question linked to the step in prescribing continuum			
Was the customer reaction handled appropriately			
Were follow up activities (call for action) agreed with the customer			
Were transitions between discussions handled naturally			
Engage, Document and Follow up			
Were Continuous Customer Understanding learning's documented			
Was achievement of call objectives and its reasons reflected			
Were Customer and Representative commitments summarized			
Were next call objectives and next call date planned / established			

0 - non existing, 1 - major area for improvement, 2 - area for improvement, 3 - comply with standard, 4 - above standard, 5 - best practice, can be an example to others

Co-visit Checklist

PLAN

STEP 1 – PLAN FOR CO-VISIT



- **Review data**
  - Co-visiting Reports
  - Personal notes
  - Sales and activities results
  - Progress on previously agreed-upon actions
  - MBO
  - Provider plans
- **Determine focus for co-visit coaching**
  - Assess Provider Representative's Ability/Willingness to complete a specific task (Can't/Won't, Could, Can)
  - Determine coaching style (Directive, Participative, Encouraging)

STEP 2 – REVIEW BUSINESS AND SET COACHING OBJECTIVES

- **Meet with the Provider Representative prior to the first interaction to review:**

  ☐ Specific Providers ☐ Providers scheduled for the co-visit

STEP 3 – ESTABLISH INTERACTION OBJECTIVES

- **Prior to each interaction, discuss with Provider Representative:**

  ☐ Provider plans ☐ PBCC objectives

IMPLEMENT

STEP 4 – OBSERVE Provider Interactions

- **For each interaction:**
  - Observe Provider Representative's interactions with providers/colleagues
  - Compare actions and results observed during interactions with the defined objectives
  - Assess how effectively Provider Representative accomplished the task within each competency (refer to the behaviors listed in the Co-visiting Report)

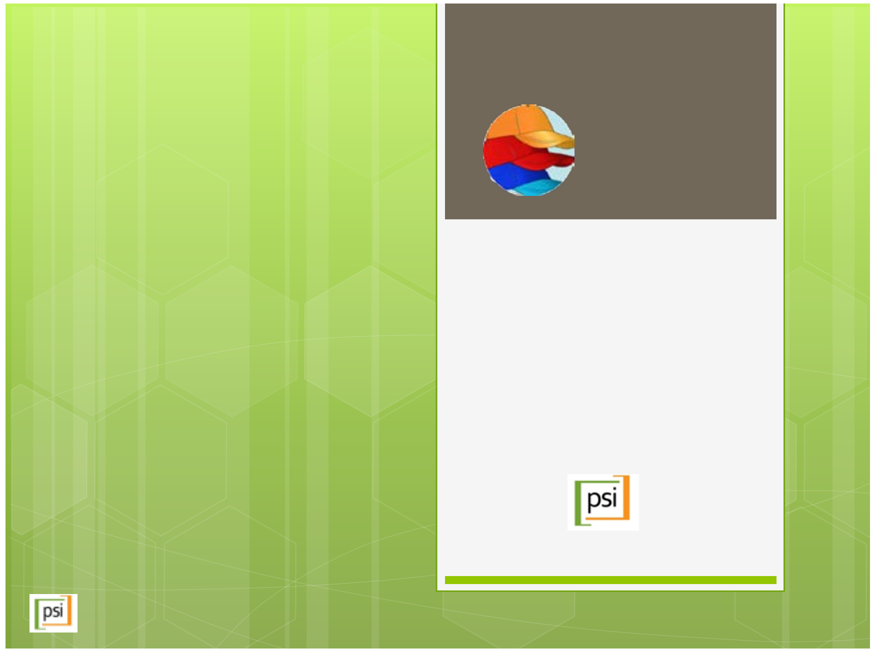
STEP 5 – PROVIDE FEEDBACK ON PERFORMANCE

- **After each interaction and at the end of the co-visit, use the Coach O.F.T.E.N. Guide to structure the coaching conversation with the appropriate coaching style:**
  - OPEN – Establish tone, set purpose for discussion, encourage Provider Representative to analyze performance
  - FOCUS – Identify tasks that impact performance and impact on results and others
  - TRANSITION – Describe observable behaviors, gain agreement
  - ENGAGE – Explore ideas for getting results, improvement, and development areas

EVALUATE

STEP 6 – Establish Coaching Continuity

- **At the end of the co-visit:**
  - Review co-visit objectives and provide honest and fair feedback
  - Agree on Next Steps and provide additional support that will be helpful to the Provider Representative
  - Take notes and complete the co-visit reports



FACILITATOR'S GUIDE

COACHING BASICS

Population Services International

TABLE OF CONTENTS

Welcome and introduction
Your roles
Triangle Production Exercise
What is coaching?
Driving Activity Task focus
Observe and Assess Performance
Offer Feedback

PREPARATION

Flip charts, hand-outs, exercises that should be prepared before the workshop session begins

You'll find a summary list in Section 10, Page 54

Alert!!!

Please review materials upfront and adjust pictures, names,

Role play scenario's and videoclips were needed to make it

Relevant for your platform or your situation

This course will teach you Coaching Basic concepts and will also allow enough exercises to experience the impact of Coaching

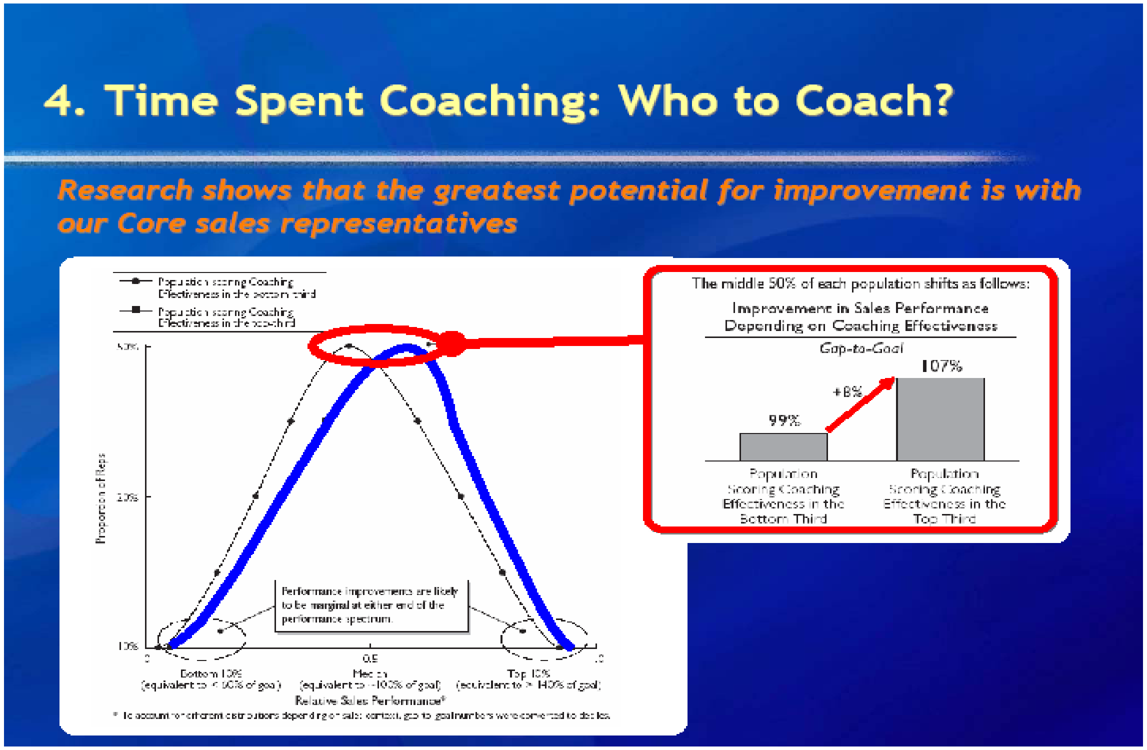
This facilitator's guide helps you to combine Flipcharts, PowerPoint, a coaching toolkit, a participant workbook, videoclips, exercise materials and templates/check lists to make it a unique coaching teaching experience

Case for change:

Improving the Impact of Our Coaching Interactions

- Make you more effective at your job
- Help you move the provider faster along adoption ladder by providing more focused and specific guidance on early-stage (targeting, needs recognition) and closing activities (committments and follow up)
- Improve your skills in key areas necessary for success in role
- Help guide you toward next-level performance
- Share high performer best practices that would help in closing more opportunities
- Increase your engagement with the role and company

You are as successful as your team is



Look at your team as a bell shape curve: you might have

1or 2 high performer

1 or 2 who or performing below expectation

6 to 8 who are meeting expectations (the middle pack)

Coaching will shift the efficiency (the bell shape) to the right:

Your team becomes high performers

Coaching efficiency can be measured :

Quantitative: numbers of days, visits, reports (see standards example) but also

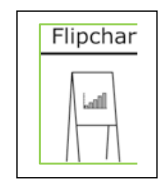
Qualitative: (360° survey on impact of development team)

Section 1: OBJECTIVES OF THE COACHING BASICS COURSE

Participation in this classroom experience will enable learners to:

- Describe **how the roles** of Leader, Manager, and Coach are different and complementary.
- Identify how Manager coaching style impacts coachee's performance.
- Assess 'Ability' and 'Willingness' to complete a specific task effectively.

Conduct a focused coaching discussion based on observable behaviors that result in a commitment to action



Please hang the flipchart with the objectives on the wall (see what flipcharts to prepare in section 10 – page 53 of this guide)

Section 2: FACILITIES, EQUIPMENT AND MATERIALS CHECKLIST

Facilities

- ☐ Main training classroom

Equipment

- ☐ Facilitator computer loaded with Coaching Basic PPT slides and possible videos if available
- ☐ LCD projector, external speakers, screen, remote control
- ☐ Flipchart easels (two located at the front of the main training room)
    - o See pre prepared flipcharts in chapter 10 (from of p 53) of this guide
- ☐ Timer or stopwatch for triangle production exercise

Supplies

- ☐ Name tents/markers
- ☐ Flipchart pads (one for each flipchart easel) and Flipchart markers
- ☐ Post its (different sizes and colors will work)
- ☐ Scotch tape (one roll for every three Participants)

Participant Materials

- ☐ **Participant Guide** (1 per participant)
- ☐ **Coaching Basics Toolkit** (1 per participant)
- ☐ Triangle Production Exercise **Worksheets** (1 per 3 participants)
- ☐ Laminated Driving **Task Place Mat** (1 per participants if possible, at least 1 per table)
- ☐ Laminated Driving **Tasks Cards** (1 set per participant)

Section 3: FACILITION PREPARATION CHECKLIST

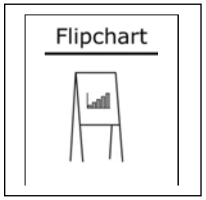
PRE-WORK

Preparation and Setup (one week before the training date)

- ☐ Review this guide and all Participant materials. (participant workbook & toolkit)
- ☐ Preview and if needed adjust the PowerPoint® presentation which you will use to guide the session - download video
- ☐ Ensure production of Driving Place Mats, Driving Task Cards, Triangle Production Exercise Worksheets
- ☐ Reserve the required room, catering, etc...

Preparation and Setup: ideally the evening before, if not possible, set up at least one hour before the start of the session)

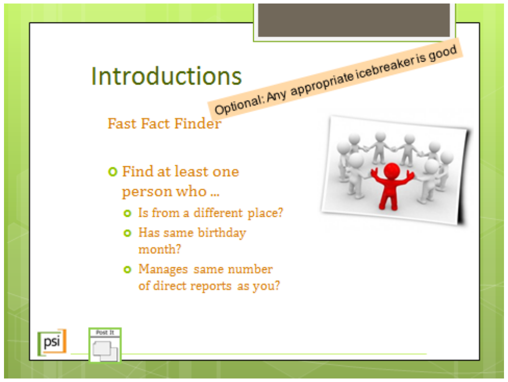
- ☐ Check to ensure that the room setup is appropriate for the number of Participants.
- ☐ Test the computer, projector, and mouse.
- ☐ Place a name tent and marker at each Participant's seat.
- ☐ Place a Participant Guide at each Participant's seat.
- ☐ Place a Coaching Toolkit at each Participant's seat.
- ☐ Prepare a set of Driving Task Cards in an envelope at each Participant's seat.
- ☐ Place Driving Place Mats at each table.
- ☐ Prepare a Parking Lot flipchart to capture open issues.



Section 4: INTRODUCTION TO COACHING BASICS:

Welcome and introduction
Your roles
Triangle Production Exercise
What is coaching?
Review data
Driving Activity Task focus
Observe and Assess Performance
Offer Feedback

15 minutes	**Introduction to Coaching Basics**
	Welcome and Introduction
 **Program Introduction** **Slide 01**	**Show slide 01.** **Welcome** Participants to the workshop. **Introduce** yourself. **Say**: Please fill out your names on your name tents. **Inform** Participants about the training facility, location of restrooms, phones, etc. **Refer** Participants to their Participant workbook and the Coaching Basics Toolkit. **Explain** that these will be used extensively during this workshop. The Participant Workbook is designed to be a practical reference and will be used in class for exercises and activities. It echoes much of the relevant material Participants will see in the presentation to support note-taking.



Introductions
Slide 02

Show slide 02. Optional

Explain that Participants will do a "Fast Fact Finder" activity with others attending the workshop.

Ask Participants to first introduce themselves by sharing their name, then search for one other member of the class who:

- Is from a different place.
- Has the same birthday month.
- Manages same number of direct reports as you do.

The first Participant pair to find each other based on these three criteria "wins."

Ask Participants to take their seats following the activity."

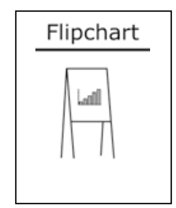
Say: This activity allowed you to meet one another, but I still need to learn more about you. Please tell me your name and where you are from.

Objectives
Slide 3

Show Slide 03.

Review: Workshop Objectives – you'll also have the objectives on the flip (see Section 10) hanging on the wall to refer to it throughout the workshop

Refer to prepared flipchart 1 on the wall (see appendix p 53)



Agenda
Slide 04

Show Slide 04.

Review: Workshop Agenda to give participants a rough estimation of the timing

Manage time to make sure breaks and start/end time are respected

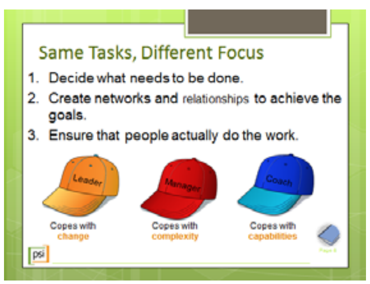
30 minutes — Introduction to coaching

Your Roles

Your Roles
Slide 05

Show slide 05.

Say: Now, let's shift to a direct look at your roles.



Same Task, Different Focus
Slide 06

Show slide 06.

Your Roles: Leader, Manager, and Coach

Say: As a Supervising Manager you have several critical roles to fulfill. You must be a Leader, a Manager, and a Coach. Let's explore how these roles are alike and how they differ.

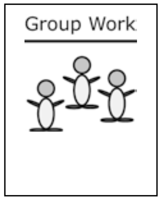
Explain that when fulfilling each role, you need to be focused on the same three primary tasks.

You need to:

1. Decide what needs to be done.
2. Create networks and relationships to achieve the goals.
3. Ensure that people actually do the work.

What is different for each of these roles is its key focus.

30 minutes	Introduction to coaching
	Your Roles



Before revealing the animated descriptors under the hats on the slide:

Say: Now let's do a "lightning definition" of each role's key focus.

Assign each table group one of the roles (Leader, Manager, or Coach).

Say: Take no more than 2 minutes to come to agreement about what one word best defines the focus (primary concern) of your assigned role. Write the word on a big post it or on the flip chart

Ask the table groups to share their ideas in the large group.

Reveal the animated descriptors of each role on the slide.

Refer to Participants workbook page 2

Review the focus or the main concern of the three different roles.

- **The Leader's focus is <u>change</u>. WB page 3**
  - He/she will motivate the teams, explain why something needs to change or what the scoop is
  - More change requires more leadership**.**
- **The Manager's focus is <u>complexity</u>. WB page 4**
  - He/she will make sure everything is in place to get the job done
  - Good management looks at data, team structure, tools needed, networks, relations,...
- **The Coach's focus is <u>capabilities</u>. WB page 5**
  - Coaches develop their teams
  - They agree on 'what good looks like', they observe performance, give honest feedback and help their team developing skills

See also: "What Leaders Really Do," by John Kotter, *Harvard Business Review*

	Introduction to coaching
	Your Roles
 **Application Activity: Which Hat? What Actions? Slide 7**	**Say:** Now that you are thinking actively about how these 3 roles—Leader, Manager, and Coach—are complementary but different, let's apply your understanding to a real-world challenge you are facing. **Show** slide 7 **Give example:** 'We have experienced recently organizational changes ' (sounds familiar?) ***As a Leader***, my role is to provide a clear business rationale for why these changes are important and how they support our goals. ***As a Manager***, my role is to help my team map out tactical steps to help them implement the new processes in their job that have come about as a result of the organizational changes. ***As a Coach***, my role is to observe how my team implements those tactical steps and provide performance feedback to them." **Say:** Now go to **page 6** of your workbook and write the challenge you are facing right now and what you can do as a leader, a manager and a coach **Say:** Once you've identified what action(s) you might take in each of these roles, share your ideas with 1-2 others at your table The purpose of the exercise is focus and to manage expectations: to link right resources on each role This course will help you develop your **coaching skills**. Other resources will help you with Leadership and Management skills

30 minutes	Introduction to coaching
	Your Roles

Three Complementary Roles
Slide 8

Show slide 8

Summarize the activity highlighting the following key points.

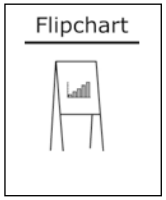
- One role is not better than another.
- One role is not replaced by another.
- Each role is different and necessary.

Say: In summary, as a **Leader**, you coach around organizational vision, direction, and change; as a **Manager**, you coach around achieving business results and as a **Coach**, you coach around development and performance.

It's also important to note, as we have discovered as we explored each role, that there are not always clear, distinct boundaries between the roles. By nature, the roles often overlap.

While much is written and much can be learned about each of these roles, we will be focusing on your role as a coach in this workshop.

	Introduction to coaching
45 minutes	**Triangle Production Exercise**
 Triangle Production Exercise Slide 9	**Show slide 9** **Say**: let's get right to "work." **(Note:** The purpose of this exercise is to demonstrate the impact that Supervising Managers have on the staff they coach. In this activity, you play a Manager of a production team that produces "triangles." You demonstrate three different approaches as a Manager through three rounds of "play." In one round, you focus on production volume; in another, you focus on quality. In the final round, you take a "hands-off" approach, allowing the Participants to work to their own result. You should intentionally withhold the purpose of the exercise from Participants for added impact during the debrief**.** **Say:** For this exercise, we will break into 3 groups: Group 1, Group 2, and Group 3. (Note: You may alternately choose to break up the audience into 2 groups and run only the "quality" and "maximum production" rounds, skipping the laissez-faire approach. However, running all three rounds is recommended if time allows**.)** **Assign** each person in the room a number**: 1, 2, or 3.** A nice way to form groups ad random is to ask participants to line up in regards of month of Birth, meaning that people who were born in January are on the far left all the way up to the persons born in December on the far right. It will bring a lot of energy in the room Once the line is made, you walk along the line assigning numbers 1-2-3-1-2-… **(Note:** Ideally, you will have a class that can be divided evenly by three. If you do not, make two groups divisible by 3, and have the third group contain the remaining Participants. For example, if there are 18 Participants, divide them into 3 groups containing 6 people. However, if you have 17, divide Participants into 2 groups of 6 people, and one group of 5 people.**)** **Say:** Much of this workshop focuses on how you can effectively coach your team. To kick things off, we are about to conduct an exercise that will demonstrate some of the fundamentals**.** **Text on Pre prepared flipchart: see picture:**

 	**Title: Triangle production (see section 10 – flipchart 2)** - **Draw as many triangles as possible in 2 minutes** - **Draw them as the example shown** - **Each team member is responsible for 1 side of the triangle** Ask Group 1 to remain in the room. Have the remaining 2 groups leave the room for round 1. Direct the Participants to remain close by. This is not a break!
 Triangle Production Exercise Slide 9 Keep slide displayed throughout the exercise	**Round 1** **Instruct** Group 1 to work in triads. **Distribute** one copy of the Triangle Production Exercise worksheet to each triad in Group 1. Refer to the flip chart and give Group 1 these directions: **Say:** As you know, things at PSI change all the time, and that is the case in this situation. **Say:** I will serve as your Manager for the next 2 minutes. Working as a team, your objective is to make as many triangles as possible, with the highest quality possible, modeled after the example on the page. There is only one process guideline: each team member has to contribute one side to the formation of each triangle. **Direct** Participants to put their names on the sheet. After they have put their names on the sheet, direct them to begin making triangles and time them for 2 minutes. **Conduct** Round 1 of the exercise (2 minutes). **(Note:** While the groups are working, emphasize maximum production without disclosing that intent. Roam the room energetically and encourage teams to make more triangles. Comment on how other teams are doing to increase competition, such as, “The other team is really producing a lot of triangles,” and offer frequent verbal praise such as, “Great job!” or “Good plan!” You may need to provide

	additional worksheets to accommodate the number of triangles they are making.) **Announce** that time is up at the end of 2 minutes. **Instruct** each team to mark their sheet with a number 1, list the names of the team members, and indicate the total number of completed triangles. **Collect** Triangle Production Exercise pages from the Group 1 triad teams.
 Triangle Production Exercise Slide 9 (Continued) Keep slide 9 displayed throughout the exercise	**Ask** Group 1 Participants to leave the room and <u>not to talk to other participants about the exercise</u>. Send in Group 2 without disclosing to Group 2 the nature/content of the exercise or experience. **Review** Group 1's worksheet results during intervals when groups are exiting and entering the room. **Round 2** **Instruct** Group 2 to work in triads. **Distribute** one copy of the Triangle Production Exercise worksheet to each triad in Group 2. **Refer** to the flipchart and give Group 2 these directions: **Say:** I will serve as your Manager for the next 2 minutes. Working as a team, your objective is to make as many triangles as possible with the highest quality possible, modeled after the example on the page. There is only one process guideline: each team member has to contribute one side to the formation of each triangle. **Direct** Participants to put their names on the sheet. After they have put their names on the sheet, direct them to begin making triangles and time them for 2 minutes. **Conduct** Round 2 of the exercise (2 minutes). **(Note:** While the groups are working, emphasize the criteria of highest quality without disclosing that intent. Look closely over the shoulders of team members, and insist that they slow down, look more closely at the prototype triangle, and perhaps use a straightedge to ensure lines are not roughly drawn. Your behavior should be to micromanage their work effort and indicate only tentative approval of their results. **Announce** that time is up at the end of 2 minutes and collect Triangle Production Exercise pages from

	the Group 2 triad teams. **Instruct** each team to mark their sheet with a number 2, list the names of the team members, and indicate the total number of completed triangles.
	Ask Group 2 Participants to leave the room and send in Group 3 <u>without disclosing to Group 3 the nature/content of the exercise or experience.</u> **Review** results during intervals when groups are exiting and entering the room. **Round 3** **Instruct** Group 3 to work in triads. **Distribute** one copy of the Triangle Production Exercise worksheet to each triad in Group 3. **Refer** to the flip chart and give Group 3 these directions**:** **Say:** As you know, things at PSI change all the time, and that is the case in this situation. Imagine that you have a new Manager with a different set of objectives that he (or she) wants you to accomplish. **Say:** I will serve as your Manager for the next 2 minutes. Working as a team, your objective is to make as many triangles as possible with the highest quality possible, modeled after the example on the page. There is only one process guideline: each team member has to contribute one side to the formation of each triangle. **Direct** Participants to put their names on the sheet. After they have put their names on the sheet, direct them to begin making triangles and time them for 2 minutes**.** **Round 3** Conduct round 3 of the exercise (2 minutes). **(Note:** Do not give the Participants further instructions. Walk around the room and appear distracted with other matters such as reviewing your Facilitator Guide, listening to voice mail, checking e-mail, etc. The more disinterested in the production of triangles you can appear, the better this will work. If Participants ask you questions, give vague answers, and say "Don't worry about it" several times**.)**
	Announce that time is up at the end of 2 minutes. Have each team mark their sheet with a number 3,

	list the names of the team members, and indicate the number of completed triangles. **Collect** the Triangle Production Exercise pages from the Group 3 triad teams. **Ask** a Group 3 Participant to invite the remainder of the class back in from the hall. **Review** Group 3's worksheet results. **Debrief** **Facilitate** a discussion about the impact of the "Manager's" coaching style on each team's performance for maximum 20 minutes**.** **Go back** to the flip chart and give the instructions one more time to the full audience. **Ask:** Did anyone hear the Manager state anything other than these three guidelines for producing triangles together? **Reveal and review** the teams' results, showing the selected worksheets from each round to the class and noting the differences in productivity and quality. **Keep slide 9 displayed.** **Ask:** What do you think accounts for the difference we see in results on these three worksheets? Let them come up with ideas • Explain that everyone can have the same tools, resources, instructions, etc., but end up producing different results. • The Manager's coaching behavior while the groups were producing triangles was the only significant difference in each round of the exercise.
	Say: Even though Managers communicate written objectives with their team through MBO's, the Manager's coaching behavior still has the ability to profoundly influence the "what" and "how" of results. **Ask:** What are some real-life examples when you experienced a coaching style that was more "hands-on" or "hands-off?" Did the difference in your behavior influence your performance?

Ask: In what situations do you think it is effective to offer a lot of oversight to help your team to accomplish their work? In what situations would you see it being more effective to step back and "let go" more?

Ask: What kind of "culture" was your Manager creating in the exercise?

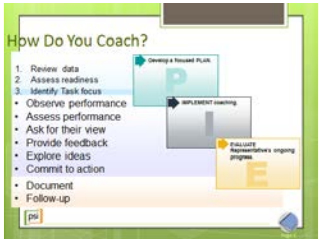
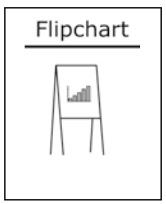
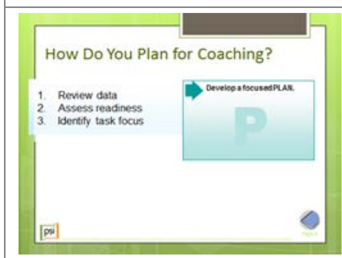
Suggested Responses:

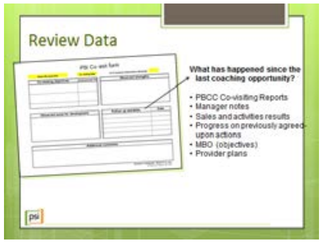
- For Group #1, the Manager was creating a "results- oriented" culture. (quantity) "What" was emphasized with little regard to "how" results were achieved.
- For Group #2, the Manager was creating a "perfection-oriented" process culture (quality) in which "how" was all that mattered.
- For Group #3, the Manager was creating a "culture of confusion" in which his/her disengagement led to very inconsistent results achieved in an unpredictable manner, but it might also create innovation.

Say: The biggest variable in the kind of culture your team experience at work is you, the Manager. Most Supervising Managers can't rely solely on their position or their authority to get results through their people.

Summarize: Their behavior as Supervising Managers is likely to have a significant influence on their team's performance — both the results achieved and how they achieve them. Supervising Managers, in the way they set the culture, coach, recognize, and reward has enormous impact on how their teams perform.

45 Minutes	Introduction to Coaching Basics
	What is coaching?
 **Coaching@PSI: What and How? Slide 10**	**Show slide 10** **Say:** As you saw in the Triangle Production Exercise, what you do and say as a Coach has a very powerful influence on results. For that very reason, **coaching is a core competency for Supervising Managers** and is part of your job requirements.
 **What is Coaching? Slide 11**	**Show slide 11** **Say:** Simply put, coaching is about developing your people. A key skill in the process of coaching is providing feedback about performance. Feedback can serve to reinforce, enhance, or correct behaviors demonstrated on the job. And, although it is important for Supervising Managers to observe the on-the-job performance of their teams during provider visits, coaching is not a single event and is not limited to co-visits. Coaching goes for every team, internally as well as field based. And for every task you ask your team. The examples in this course focus on Field based teams (the biggest group in most companies)
 **Slide 12**	**Show slide 12** **Say:** Coaching and feedback should be an ongoing activity within the performance management process at PSI. Sometimes supervising Managers believe that a successful co-visit is one in which the Provider Representative takes the Manager on a full day of provider visits. The time available for coaching may be limited to the few minutes between visits and a rushed conversation at the end of the day. Just as an "outstanding" Representative is not purely defined by high visit volume, an "outstanding" Coach should be more focused on quality coaching opportunities rather than the quantity of visits observed. Every interaction with a Provider representative is an opportunity to coach.

45 Minutes	Introduction to Coaching Basics
	What is coaching?
 **How do You Coach? Slide 13** 	**Show slide 13** **Refer** Participants to page 1 of the Coaching Basics Toolkit. **Say:** There are 3 major parts of this coaching framework: Plan—Implement—Evaluate. We will refer to this framework throughout the workshop. Here is a quick overview of what we will cover. ***Click to advance slide animation of each section of P-I-E. and refer to Flipchart 3 (section 10)*** To Plan for coaching, you review data, assess performance readiness, and identify the task focus for the coaching conversation. To Implement coaching, you observe and assess performance, ask the Provider Representative for his/her view of performance, offer feedback, explore ideas, and commit to action. And finally, to evaluate the Provider Representative's ongoing progress, you must document your observation and follow up as agreed.
 **How Do You Plan for Coaching? Slide 14**	**Show slide 14** Refer Participants to page 2 of the Coaching Toolkit. **Say:** Let's look more closely at how you plan a coaching conversation. Note that this first phase is not just "plan," but rather create a focused plan for coaching. Observing performance in the field and other interactions offers many potential aspects of provider interaction to discuss. Each time, you can compare the observations versus the standards or 'how good looks like' Planning requires creating a clear focus for your coaching, which is more likely to help the Provider Representative know what he or she most needs to do more, less, or differently.

45 Minutes	Introduction to Coaching Basics
	What is coaching?
 **Review Data** **Slide 15**	**Show slide 15** **Say:** How do you begin? By revisiting the next steps and follow-up agreed upon in the last coaching conversation. If coaching took place during a co-visit, review the follow-up activities you noted in the Co-visiting Report and use them as a basis for planning the upcoming coaching conversation. Other sources of data, such as sales and activities results since the last discussion, your Manager notes, the Provider Representative's performance objectives in the MBO, and customer plans, can all inform the optimal focus for coaching**.**

45 minutes	Introduction to Coaching Basics
	Driving Activity: Task Focus

How Is Your Driving? Slide 16

Show slide 16

Again: if this activity doesn't make sense for your platform, you might consider changing to subject of the exercise to any activity that's appealing for your country.

Example: driving a scooter, hiking/walking – orientation at different seasons, different conditions, different participants. Repairing materials – card reading – compass reading - …

Say: Let's do a brief activity related to developing a focused plan for coaching.

Ask: How many of you consider yourselves "good drivers?" All the time? Even before your morning coffee? How many of you think you are "outstanding" drivers?

Even if you were driving a large truck? Or, driving at night? Or, in winter weather? Or, in blinding rain?

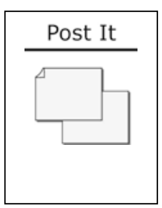
Or, in the mountains? Can we agree that driving is not a single, simple task? It takes lots of different skills to drive different types of vehicles in many kinds of situations.

To get us into the right mindset, let's spend a little time learning more about our driving competencies.

Direct: At your tables, you'll be working in groups of three. Each group needs one of the Driving Place Mats that are on your tables, and each of you has a set of Driving Task Cards.

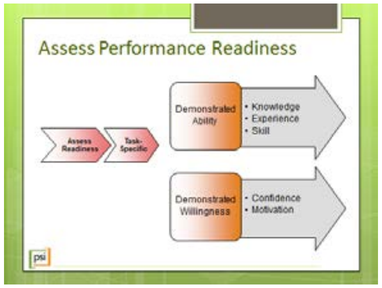
Say: On your place mats, you see a Performance Readiness by Task grid. We'll be spending a lot of time with this today, but without going into too much detail now, I'd like for each of you to think about your Willingness and your Ability to perform each task presented on the Driving Task Cards. Then, place each of your Driving Task Cards onto the grid and explain your rationale to your partners. When you're all done, we'll come together as a group and see who we want to drive to dinner tonight!

Manage time so that the activity does not take more than 10 minutes.

	Debrief as a group. Point out that (in all likelihood) each group has cards all over the mat, meaning that their Ability and Willingness certainly varies widely depending on the task on the card. Offer a few examples of task card placement to the group, drawn from various place mats that you see in the room. **Say:** In this workshop, we are going to spend a lot of time asking you to do assessments of your direct reports. It is tempting to label ourselves as “good” or “bad” drivers, rather than “good at a particular driving task.”We are all not one-dimensional drivers, we’re not one-dimensional Managers/Coaches, and our teams are not one-dimensional either. A Provider Representative may be able to perform well at describing informed choice to a Provider but be poor at active listening to concerns. In order to make sure that we are coaching to the right skills at the right time, Performance Readiness by Task is a key concept that we will be learning and using. **Say:** Part of planning your coaching conversation is to determine which 2-3 tasks you want to focus upon. So, let’s be clear about what we mean by competencies, skills, and tasks.
 **Competencies-Skills-Tasks-Behaviors** **Slide 17** 	**Show Slide 17** **A COMPETENCY** is a broad category of associated skills, knowledge, behaviors, and/or abilities that combine to describe what is required for successful performance. In this example, a competency that a Manager might coach to is “1/1 interaction” which means PBCC for your provider Reps… …and the specific **SKILL**, Moving your provider up in Adoption continuum. A Manager would determine a specific T**ASK** or the application of that skill. In this example, the Manager would focus on the task “Open and identify provider needs focused on the target population.” Finally, the Manager would observe **BEHAVIORS** such as seeing and hearing the Provider Representative open by saying, “During our last conversation, we were discussing challenges in long term Family Planning ...” **Ask Participants if they have any questions.** **Ask participants to put Tasks on post-its they want to coach one member of their teams on: discuss in group if these are tasks and what kind of behaviors you could observe.**

60 Minutes	Introduction to Coaching Basics

Observe and Assess Performance



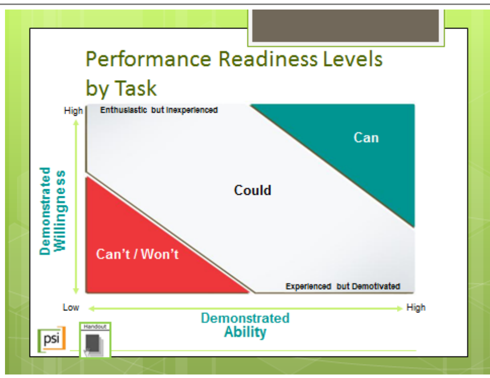
Performance Readiness Defined
Slide 18

Show slide 18

Say: When we refer to "performance readiness," we are talking about a combination of demonstrated Ability and Willingness to perform a specific task.

Define the terms "Demonstrated Ability" and "Demonstrated Willingness" as shown on the slide. There is no judgment on being a good/bad Provider Reps: people are good/less good for different tasks

Go back to the post-its and select 1 or 2 tasks you want to coach one member of your teams on: define how the ability (can he do it) and willingness (is he willing to do it) is for each task



Assessing Performance Readiness
Slide 19

Show slide 19

Refer Participants to page 3 of the Coaching Basics Toolkit.

Explain: You have some experience now with this concept from the Driving Task activity. **Let's apply it within the context of assessing the selected tasks of the post its for a Provider Representative's performance**. This is one of the key concepts of this workshop and what drives much of the Coaching Basics Toolkit.

- The three levels of Provider Representative demonstrated Performance Readiness **by Task** include those who CAN, those who COULD, and those who CAN'T or WON'T.
- Supervising Managers need to vary the level of support and the degrees of freedom they offer to Provider Representatives based on the demonstrated Performance Readiness **by Task**.
- Supervising Managers should be **Directive** with those who **CAN'T** or **WON'T** perform the specific task, **Participative** with those who **COULD** perform the specific task, and **Encouraging** with those who **CAN** perform the specific task.

Illustrate how the same Provider Representative might be at different levels of

<table>
<tr>
<td></td>
<td>performance readiness depending upon the task (analyzing data, assessing beliefs, product knowledge).

Share a personal example or an example from the Participants of your own varying levels of performance readiness for different tasks.</td>
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**How Do You Implement Coaching
Slide 20**</td>
<td>**Show slide 20**

Say: Now let's transition to the implementation step of the process… actually having the coaching conversation. You will: first read the points, then go into details

• Observe performance: as said and done

• Ask for the coachee's view and let them compare observations versus the standards for each task **(Standards = how good looks like)**

How clear are you about the effectiveness of what you see and hear? Can you recognize and describe what "good" looks like?

We'll look deeper into that in a moment

• We'll discuss in a bit how to offer feedback:

For now: Feedback is what you observe, what is said and done

• Next: Explore ideas how to continue 'perfect' behavior or how to bring observed behavior up to the standards

• Commit to action</td>
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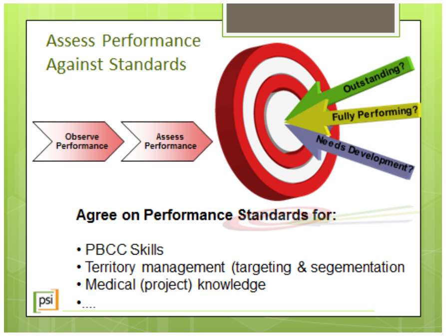 **Assess Performance Against Standards** **Slide 21**	**Show slide 21** **Say:** An essential part of being an effective Coach is knowing the performance standards for Provider Representatives—what they are supposed to do and recognizing what “good looks like” when they do it well. Performance standards exist in various forms and sources. • **Describe briefly the standards of the tasks on the selected post its**
 **PBCC Skills Reflection Sheet** **Slide 22**	Show slide 22 **Say:** The PBCC framework includes extensive descriptions of the specific skills and behaviors that Provider Representatives should use in provider interactions. The PBCC Reflection Sheet helps you to document your observations and assessment of Provider Representative Performance against these standards, and provides you with the behaviors that should be the focus of your coaching.

60 Minutes	Introduction to Coaching Basics
	Offering Feedback
**Ask for Their View of Performance** **Slide 23**	**Show slide 23** **Say:** Before you offer feedback on what you observed, encourage the Provider Representative to analyze his/her own performance. This builds engagement in the coaching process and helps him/her to build self-awareness It will also encourage the people to think over their own performance when you're not there.
Flipchart  **Slide 24**	**Flipchart exercise:** Ask participants to share the things they don't like about getting feedback – what gives a good grasp of what to do to give feedback in a good way. You could also ask if there are behaviors they actually do and maybe could stop doing in giving feedback.
**Successful Feedback** **Slide 25**	**Show slide 25** **Say:** Tips for making feedback successful: **Why:** explain why you coach: what is in it for the coachee? Make them 'open' to receiving feedback: they win! **When**: As close to the event as possible. No much use to give FB of anything happened a while ago **How:** Perceived as intended (certain/consistent) No turning around the subject: fair observation shared in an adult and kind way **Where:** Neutral locations provide a more relaxed context for meaningful discussions about performance. Preferable not in front of others, not in a threatening environment (the boss's office) **What:** Focused on behavior: we go more in detail on next slides

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<tr><th>60 Minutes</th><th>Introduction to Coaching Basics</th></tr>
<tr><td></td><td>Offering Feedback</td></tr>
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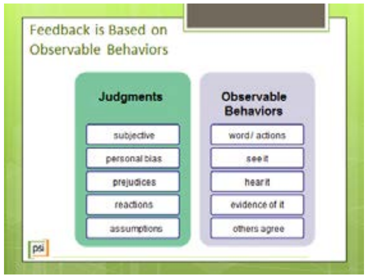

Feedback is Based on Observable Behaviors
Slide 26
</td><td>

Show slide 26

Explain: The distinction between judgment and behavior is absolutely critical to effective coaching.

Judgments are often based off of assumptions, prejudices, and biases that we may not even be aware we have. Judgments are usually subjective. If we provide feedback based on judgment alone, we may find that we jumped to a wrong conclusion and then our feedback may be inappropriate. Instead, supervising Managers should base feedback on observable behaviors.

Behaviors are those words and actions that you could see and hear if you were watching a videotape.

Emphasize that in assessing performance, Managers are making judgments (e.g., Is this behavior effective relative to the performance standard?). However, they should be supported by behavioral observations.
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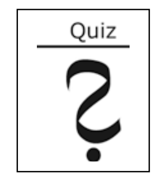
Judgments or Observable Behaviors?
Slide 27
</td><td>

Show slide 27

Ask Participants (as a large group) to identify whether the statement is a judgment or an observable behavior. **(animated: each line comes with a mouse click)**



Answers:

- “Ivan is resistant to change.” (judgment)
- “She doesn’t really understand the commercial model.” (judgment)
- “He talks more than he listens.” (behavior)
- “That closed question showed that you understood the provider’s point.” (behavior—“closed question” and judgment—“showed that you understood” is an inference based on the behavior).
- “You had great body language during that visit.” (judgment)
- “Your key messages were not convincing.” (judgment)
- “Your key messages were supported by data.” (behavior)
- “You were doing fine, then you blew the closing.” (judgment)

For each/any of the judgment statements, ask Participants for an example of a behavior that might support that judgment. (Example: Behaviors that demonstrate “great body language” might include direct eye contact.)
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60 Minutes	Introduction to Coaching Basics
	Offering Feedback

Observing Behaviors Skill Practice
Slide 28

Show slide 28

Please consider video-recording a scenario of your own.

Say: Let's observe behaviors.

Explain that Participants are to focus on a representative's behavior and notice observable behaviors.

Show the video interaction.

Debrief Participants' behavioral observations.

Possible Observation: Will states that his previous manager had discussed this issue with him several times before; he acknowledges that he does, in fact, focus mostly on certain providers. A judgment statement might be "Will is resistant to change". The behavioral observation to support this is Will's question, "Why should I change?"

Say: At your tables, discus what provider representative competency needs to be addressed by the supervising manager. What is the observed performance readiness level for the tasks associated with this competency?

Possible Responses – Customer Focus Orientation, Customer Plan and Execution. Performance Readiness is "High Ability, Low Willingness".

Video Script: Narrator – During your second field visit with Will, you have confirmed your suspicion that he is only pursuing relationships with familiar providers, and is avoiding PBCC visits that would be more challenging. You decide to open a conversation with Will, and ask him whether or not the agreed-upon parameters for success were achieved during his visits. Will says that all of his interactions today have been successful. You agree, and ask if he has any thoughts about how to use those skills to advance his position among more challenging providers in his territory.

Will replies, "I think I know what you're getting at. The previous supervising manager brought this up a few times too. Look, I know I visit mostly providers that I have good relationships with. But that's more

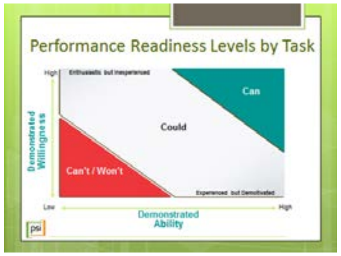
60 Minutes	Introduction to Coaching Basics
	Offering Feedback
	beneficial for my territory. You see, these providers produce the majority of my business, so it's more effective for me to focus on them. At one point, they were all unfamiliar, but I spent a lot of time building my relationships with them. Interacting with the others take more time, and doesn't provide the results we need. Why would I change?”

Section 5: HOW TO IMPLEMENT COACHING

Directive, Participative and Supportive Style

60 Minutes	How to implement Coaching?
	Coaching Styles
 **Coaching Styles Slide 29**	**Show slide 29** **Say**: Research has shown that effective coaches vary their coaching style according to the Provider Representative’s level of readiness for, or current performance on, a specific task.

60 Minutes	How to implement Coaching?
	Coaching Styles



Assessing Performance Readiness
Slide 30

Show slide 30

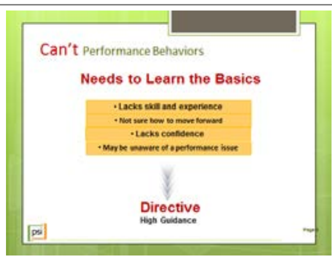
Refer Participants to page 3 of the Coaching Basics Toolkit.

Explain: You have some experience with this concept from the Driving Task activity. Now, let's apply it within the context of assessing a Provider Representative's performance. This is one of the key concepts of this workshop and what drives much of the Coaching Basics Toolkit.

- The three levels of Provider Representative Performance Readiness by Task include those who **CAN**, those who **COULD**, and those who **CAN'T** or **WON'T**.
- Managers need to vary the level of support and the degrees of freedom they offer to provider Representatives based on the Performance Readiness by Task.
- Managers should be Directive with those who **CAN'T** or **WON'T** perform the specific task, Participative with those who **COULD** perform the specific task, and Encouraging with those who **CAN** perform the specific task.

Illustrate how the same provider Representative might be at different levels of performance readiness depending upon the task (analyzing data, assessing beliefs, product knowledge).

Share a personal example or an example from the Participants of your own varying levels of performance readiness for different tasks.



"Can't" Performance Readiness Behaviors

Show slide 31

Refer to page 4 of the Coaching Basics Toolkit.

Say: A provider representative who CAN'T perform a task needs to learn the basics, practice, as well as observe and work with others more skilled to build confidence.

Review the behavioral specifics that correspond to the CAN'T/WON'T performance readiness level shown on the slide.

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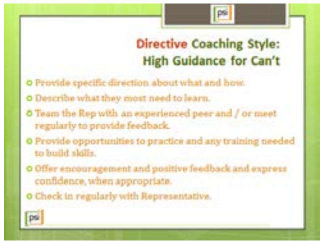

Directive Coaching With Can't
</td><td>
Show slide 32
Refer to page 5 of the Coaching Basics Toolkit.
Say: The Directive coaching style, when used with a Provider representative at a CAN'T level of readiness for a task, is focused primarily on helping him or her learn the basics through telling, teaming, and training.
Review the specifics of the coaching behaviors on the slide.
</td></tr>
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Won't Perform.Beh.
</td><td>
Show slide 33
Refer to page 4 of the Coaching Basics Toolkit.
Say: A Provider representative who WON'T perform a task needs to turn around his/her performance in a timely way.
Review the behavioral specifics that correspond to the WON'T performance readiness level shown on the slide.
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Directive Coaching Style
</td><td>
Show slide 34
Refer to page 5 of the Coaching Basics Toolkit.
Say: The Directive coaching style, when used with a Provider representative at a WON'T level of readiness for a task, is used to communicate that his/her performance is unsatisfactory, the consequences, and to create an action plan for improvement.
Explain: Note that PSI Performance Improvement Plan (PIP) enables you to address unacceptable performance (does not meet performance expectations) or marginal performance (barely meeting minimum expectations) on a sustained or intermittent basis in a timely fashion.
Say: It is critical for you to understand the PIP policy and process and to consult with HR and your Manager about performance issues that are highly concerning to you.
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60 Minutes	How to implement Coaching?
	Coaching Styles

What Does “Directive” Sound Like?
Slide 35

Show slide 35

Click to advance slide through three dialogue bubbles, reading them for Participants as you go.

- “To make sure you get started in the right direction, I want to review a few steps in our process that I view as non-negotiable and see if you have any questions on how to proceed.”
- “Although I appreciate your input, I simply don’t agree with your assessment of the provider. I believe there’s always some way to try to improve the situation. With that in mind, here’s what I need you to do by tomorrow afternoon. First, think of two to three things that you will do this quarter to try to address the performance. Second, I need you to …”
- **“**I’d like you to present this at our next district meeting. You’ll have 10 minutes at the most to present the information, so you’ll need to be concise and present the most salient facts. How about this? Start working on this tomorrow, and call me by Friday to let me know how you’re progressing.”

Ask: What would be the impact of using a Directive style with a Representative who is demonstrating high performance on a task?

Suggested Response: Demotivation, perception of micro-managing and lack of trust, confusion

Ask: Has anyone had to use the Directive style with a Provider representative?

Solicit one example from Participants or supply your own example. Ask them to refrain from revealing any identifying information about the person in the example they are sharing.

“Can” Performance Readiness Behaviors

Show slide 36

Say: Provider representatives who CAN perform a task very well both need and seek to stretch, to achieve, and learn even more.

Review the behavioral specifics that correspond to the CAN performance readiness level.

60 Minutes	How to implement Coaching?
	Coaching Styles

Encouraging Coaching Style
Slide 37

Show slide 37

Refer to page 7 of the Coaching Basics Toolkit.

Say: The Encouraging coaching style, when used with a Provider representative at a CAN level of readiness for a task, is about asking, listening, and providing new and different opportunities to advance the business and the team.

Review the specifics of the coaching behaviors on the slide.

What Does “Encouraging” Sound Like?
Slide 38

Show slide 38

Click to advance slide through three dialogue bubbles.

- “You clearly have a strong understanding of this provider’s business … what do you plan to do next?”
- “Put yourself in my shoes here. If you were running the district, what decision would you make … and why?”
- “It sounds like you have a good handle on this. Just keep me informed on what you and your counterparts are doing so there are no surprises, and by all means, let me know how I can help you out.”

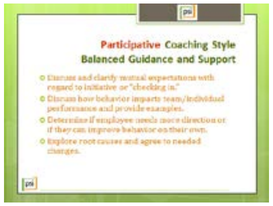
Ask: What would be the impact of using an Encouraging style with a Provider representative who is not demonstrating satisfactory performance on a task?

Suggested Response: Floundering, diminishing confidence within provider representative, and diminished trust in Supervising Manager

Ask: Has anyone had to use the Encouraging style with a Provider representative?

Solicit one example from Participants or supply your own example. Ask them to refrain from revealing any identifying information about the person and just describe the experience.

60 Minutes	How to implement Coaching?
	Coaching Styles
 **Could Behaviors Needs to Expand Skills** **Slide 39**	**Show slide 39** **Explain**: The COULD level of performance readiness covers a wide range that includes varying degrees of Ability and Willingness. **Say:** Behaviors you may see in those who are highly enthusiastic but still have room to grow in terms of skills and experience, include curious questioning, volunteering for too many things, and a rapid learning curve. **Review** the behavioral specifics that correspond to the COULD Provider representative readiness.
 **Participative Coaching With Enthusiastic/ Inexperienced Reps**	**Show slide 40** **Refer** to page 4 of the Coaching Basics Toolkit. **Say:** The Participative coaching style, when used with a Provider representative at a CAN'T level of readiness for a task, is focused primarily on helping him or her expand their skills and realistically manage their desire to "do it all" (just not all at once). **Review** the behavioral specifics that correspond to the COULD Provider representative readiness.
 **Could Behaviors Needs to Engage**	**Show slide 41** **Say:** Behaviors you may see in those who are highly demotivated for a task include a lack of engagement in activities and work relationships, and a sense of defensiveness and/or deflation. **Review** the behavioral specifics that correspond to the COULD Provider representative readiness.

 **Participative Coaching Style With Demotivated Reps**	**Show slide 42** **Refer** to page 4 of the Coaching Basics Toolkit. **Say:** The Participative coaching style, when used with a demotivated Provider representative at a COULD level of readiness for a task, is used to help re-engage his/her motivation and better apply his/her knowledge and skills, proactively and willingly. **Review** the specifics of the coaching behaviors on the slide.
 **What Does "Participative" Sound Like?** **Slide 43**	**Show slide 43** ***Click to advance slide through four dialogue bubbles.*** • "Let me see if I understand your perspective." • "Can you think of an approach other than the one you've already tried that might yield the results we're after?" • "Now that I've explained the general direction I think we need to take, I'd be interested in hearing your honest critique so that we can include any alternative suggestions you might have that would improve the plan." • "Help me understand how you arrived at that decision." **Suggested Response:** If you inherit a Provider representative who is actively on a formal Performance Improvement Plan, a Directive approach is appropriate. Otherwise, it is probably more effective to begin with a Participative style to explore any performance issues that are of concern. **Ask:** What should you do as a new Supervising Manager who has inherited a Provider representative whose level of performance readiness has been treated as CAN'T/WON'T by the previous Manager?
 **Lunch**	**Show slide 44** **Offer** Participants one hour for a lunch break.

60 Minutes

How to implement Coaching?

Coaching Styles

The Coach O.F.T.E.N. Guide
Slide 45

Show slide 45

Refer Participants to pages 6 and 7 of the Coaching Basics Toolkit.

Review the Coach O.F.T.E.N. Guide on page 6.

- **Open**: Establish tone, set purpose for discussion, encourage Provider Representative to analyze performance.
- **Focus**: Identify tasks that impact performance and impact on results and others.
- **Transition**: Describe observable behaviors/gain agreement.
- **Engage**: Discuss getting results, developmental areas, obstacles.
- **Next Steps:** Plan of action and follow-up.

Say: The Coach O.F.T.E.N. Guide can help you both Plan and Implement the coaching conversation, as we will see during the skills practice we are about to engage in.

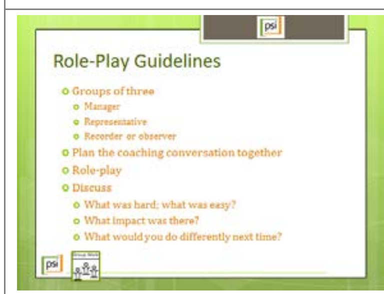
Explain that the comprehensive table on page 7 can help one better understand how to demonstrate how to adjust their coaching styles to be Directive, Participative, or Encouraging for each step of the coaching conversation.

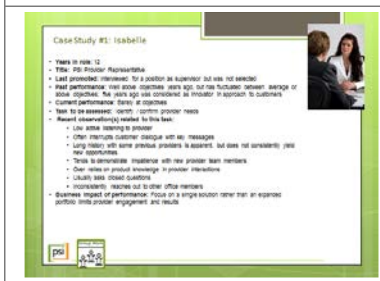
Point out an example of the difference in styles for Next Steps:

- Directive: Develop and document a written plan of action and gain commitment for what the provider Representative will do to improve and how you will follow up.

- Participative: Negotiate a plan of action and gain commitment for how the Provider representative will continue development of skills and behaviors.

- Encouraging: Support a plan of action and gain commitment for how you will partner with the Provider Representative to sustain high performance.

155 minutes	Coaching Skill Practices
	Case Study Role-Plays
 **Coaching Skills Practice**	**Show slide 46**
 **Role-Play With Your Representatives**	**Show slide 47** **Say:** Now we’re going to begin practicing your coaching skills in a series of role-plays that will be somewhat like what you face with your real Provider representatives.
	**Show slide 48** **Say:** Each one of you will have the chance to play the Supervising Manager at least once this afternoon. **Distribute** the Recorder Checklist to each Participant.

155 minutes	Coaching Skill Practices
	Case Study Role-Plays
Role-Play Guidelines **Slide 48**	**Explain** the Role-Play Guidelines and timing. Plan: Working as a triad, spend 10 minutes developing a plan for coaching Isabelle using the Coaching Conversation Worksheet in your Participant Guide. Implement: Then, assume your different roles of Manager, Provider Representative, and Recorder and role-play the coaching conversation for 10 minutes. Evaluate: You can then discuss the interaction with your colleagues for 5 minutes. If you were the Recorder, complete the Recorder Checklist. If you were the Supervising Manager, ask the Recorder what statements/phrases seemed most true to the Participative coaching style. Ask the person playing the Provider Representative what was most helpful or made the most impact on her, given her profile and current performance.
 **Case Study #1: Isabelle** **Slide 49**	**Say:** So, let's meet "your" first Provider Representative now. **Show slide 49** **Review** Representative profile of Isabelle. **Facilitate** group discussion to identify any key concerns regarding Isabelle's performance. **Highlight** the task to be assessed. • **Ask** Participants what readiness level they perceive Isabelle is at for the task of "Identifying/confirming customer needs." • **Confirm** that Participants will need to use a Participative coaching style that would help Isabelle become more engaged and motivated to perform.

<table>
<tr><td>155 minutes</td><td><h1>Coaching Skill Practices</h1></td></tr>
<tr><td></td><td><h2>Case Study Role-Plays</h2></td></tr>
<tr><td>Role-Play #1 Debrief</td><td>Facilitate a large group debrief:
What were the challenges for those of you who role-played the Supervising Manager?
What are some examples from the Recorders’ notes of specific language that Participants felt exemplified the three coaching styles?
Offer practical guidance aligned with the Participative coaching style based on specific Participant questions and experiences in the role-play.</td></tr>
<tr><td>
Case Study #2: Marlena</td><td> Show slide 50 Review the Provider representative profile of Marlena. Facilitate a group discussion of the any key concerns regarding Marlena’s performance. Highlight the task to be assessed. Ask Participants what readiness level they perceive Marlena is at for the task of “Competent PBCC interaction.” Confirm that Participants will need to use a Participative coaching style that would help Marlena further develop her skills and capitalize on her eagerness to grow and achieve. </td></tr>
<tr><td></td><td> Review the Role-Play Guidelines and timing again as needed. Plan: Again working as a triad, spend 10 minutes developing a Plan for coaching Marlena using the Coaching Conversation Worksheet in your Participant Guide. Implement: Then, assume your different roles of supervising manager, Provider representative, and Recorder and role-play the coaching conversation for 10 minutes. Each person should now be playing a different role than in Role-Play #1. Evaluate: You can then discuss the interaction with your colleagues for 5 minutes. If you were the Recorder, complete the Recorder Checklist. If you were the Manager, ask the Recorder what </td></tr>
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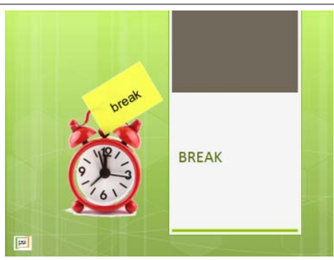
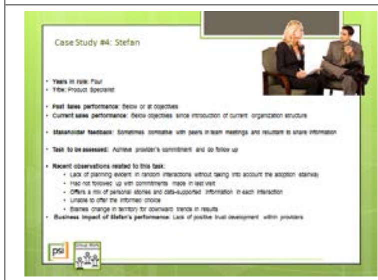
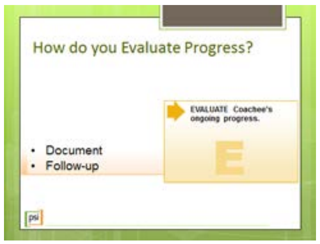
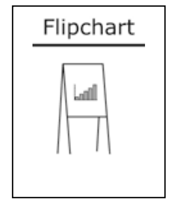
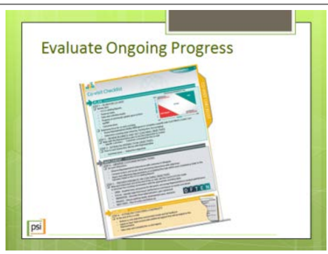
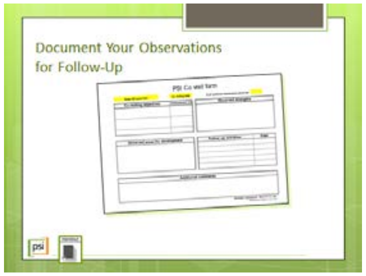
155 minutes	**Coaching Skill Practices**
	Case Study Role-Plays
	statements/phrases seemed most true to the Participative coaching style. Ask Marlena what was most helpful or made the most impact on her, given her profile and current performance.
Role-Play #2 Debrief	**Facilitate a large group debrief:** • What were the challenges for those of you who role-played the Manager? • What came easily and why? • What are some examples from the Recorders' notes of specific language that Participants felt exemplified the three coaching styles? • Offer practical guidance aligned with the Participative coaching style based on specific Participant questions and experiences in the role-play.
 **Break**	**Break for 15 minutes.**
 **Case Study #3: David**	**Show slide 51** **Explain** that Participants will now go through another role-play, but half of them will practice coaching one profile (David) using an Encouraging style, while the others will coach a different profile (Stefan) using the Directive style. **Randomly divide** Participants into two groups of triads and assign them a profile to work on. First, show the slide.

155 minutes	Coaching Skill Practices
	Case Study Role-Plays
Slide 51	**Review** the Provider representative profile of David. **Facilitate** a group discussion of any key concerns regarding David's performance. **Highlight** the task to be assessed. • **Ask** Participants what readiness level they perceive David is at for the task of "Sharing information with customers." **Confirm** that Participants will need to use an Encouraging coaching style that would help David continue to stretch by identifying new opportunities.
 **Case Study #4: Stefan** **Slide 52**	**Show slide 52** **Review** the Provider representative profile of Stefan. **Facilitate** a group discussion of any key concerns regarding Stefan's performance. **Highlight** the task to be assessed. • **Ask** Participants what readiness level they perceive Stefan is at for the task of "Demonstrating a professional relationship/reliability." **Confirm** that Participants will need to use a Directive coaching style that would address Stefan's unsatisfactory results and make clear his need to improve by adhering to a specific action plan.
	Review the Role-Play Guidelines and timing. Plan: Again working as a triad, spend 10 minutes developing a Plan for coaching David using the Coaching Conversation Worksheet in your Participant Guide. Implement: Then, assume your different roles of Supervising manager, Provider representative, and Recorder and role-play the coaching conversation for 10 minutes. Each person should now be playing a different role than in Role-Play #1 and #2. Evaluate: You can then discuss the interaction with your colleagues for 5 minutes. If you were the

155 minutes	Coaching Skill Practices
	Case Study Role-Plays
	Recorder, complete the Recorder Checklist. If you were the Manager, ask the Recorder what statements/phrases seemed most true to the Participative coaching style. Depending on which Representative you coached, ask David or Stefan what was most helpful to him, given his profile and current performance.
Role-Play #3 and #4 Debriefs	**Facilitate a large group debrief of Role-Plays 3 and 4, first of David, then of Stefan:** • What were the challenges for those of you who role-played the supervising manager? • What came easily and why? • What are some examples from the Recorders' notes of specific language that Participants felt exemplified the three coaching styles? • Offer practical guidance, in turn, aligned with the Encouraging and Directive coaching styles based on specific Participant questions and experiences in the role-play.
Role-Play Wrap-Up	**Say:** For each of you, there is likely to be one of the three styles you have now learned about and practiced that is the most comfortable for you. It will be important for your own growth as a Manager to learn how to adapt your style effectively to the readiness level of the Provider representative, which may mean stretching and seeking additional practice and feedback opportunities.

20 Minutes	Evaluate Ongoing Progress
	Checklists and Documentation
**How do you Evaluate Progress?**	**Show slide 53** **Say**: In the Evaluate step, you document your observations in the Co-visiting Report, monitor, and review progress with the Provider representative. Refer to your PIE flipchart 
**Evaluate Ongoing Progress** **Slide 54**	**Show slide 54** **Refer** to page 8 of the Coaching Basics Toolkit. Review the Co-Visit Checklist on page 9. **Say:** This checklist can help you ensure that you are monitoring not only the Provider representative's performance and ongoing progress, but your own thoroughness in terms of the Plan-Implement-Evaluate framework for coaching. The PBCC Co-Visiting Interaction Skills Reflection sheet is also a useful tool for capturing both the Provider representative's and your own perspective and what consensus view you developed of behaviors demonstrated and observed.

20 Minutes	Evaluate Ongoing Progress
	Checklists and Documentation



Document Your Observations for Follow-Up

Slide 55

Show slide 55

Say: The Co-visiting Report is an example of a documentation summary that may be used.

Note: Your region/country may have a different form to assess Provider Representative performance after Field Trips.

Say: The Co-visiting Report should be completed after each field visit with a Provider Representative. It provides a record of what tasks and behaviors were observed during the field visit and what follow-up is needed.

Explain that the purpose of the Co-visiting Report is to facilitate coaching conversations between Supervising Managers and Provider Representatives. It is intended to be a coaching tool and not an assessment tool. It addresses certain competencies and tasks.

Ask: In what way is the Co-visiting Report a coaching tool?

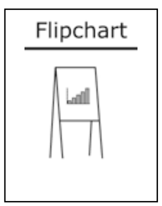
Suggested Response: The Co-visiting Report is a summary record of tasks and behaviors observed. The behavioral specifics are discussed with the Provider Representative during the coaching conversation, and the follow-up activities can help create coaching continuity between field visits and other coaching opportunities. It is the face-to-face coaching conversation where the greatest amount of coaching takes place.

20 Minutes

What if Performance doesn't improve?

Common Performance Issues

What if Performance Does not Improve?
Slide 56



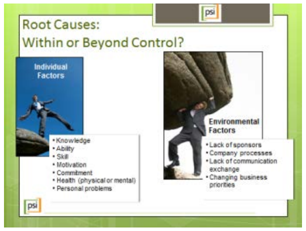
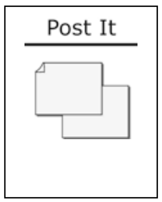
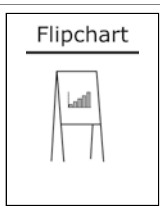
Show slide 56

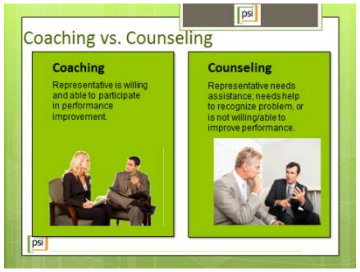
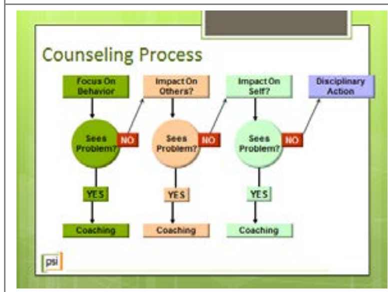
Say: Now you've been coaching, you've varied your coaching style to the specific task, and you've provided ongoing feedback. What happens if you do not see the improvement in performance that you hoped for?

Solicit input for examples of common performance issues & **Capture** input on a flipchart.

Suggested Responses:

- Inconsistent performance: strong at some tasks and weak at others
- Roller coaster performance with highs and lows, but no sustained performance
- Poor execution of PBCC
- Decline in attitude and motivation
- Decline in quality of discussions with providers
- Unable to handle objections around difficult topics
- Can't or won't prioritize focus on appropriate providers
- Too much time off-territory (e.g., starting late, leaving early)
- Consistently late to work or meetings
- Resists change
- Resists coaching
- Late on administrative tasks (expense reports, visit reporting)
- Misconduct (violating policies)

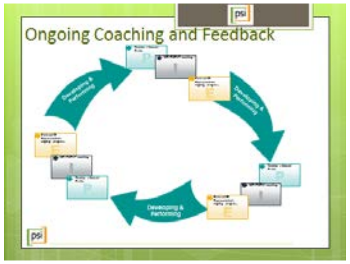
20 Minutes	What if Performance doesn’t improve?
	Common Performance Issues
 **Root Causes: Within or Beyond Control? Slide 57** 	**Show slide 57** **OPTIONAL** **Review** environmental versus individual factors that affect Provider Representative performance. **Ask** ideas from Participants about potential reasons for lack of performance improvement and put them on post its. **Suggested Responses:** • Provider representative does not agree that performance issue exists. • Provider representative is unclear about expectations. • The consequences for not improving performance were minimal, inconsistent, or not motivating. • Provider representative resists changing behavior. ***Click to build slide animation for responses.*** **Ask**: How can a Supervising Manager support an employee when poor performance is related to environmental/external factors? What are the individual factors that may affect performance? Where does “attitude” come in?
 **Common Manager Barriers**	**Show slide 58.** **OPTIONAL: the slide might not be valid for you platform** **Ask:** What are some barriers or obstacles that keep Supervising Managers from taking action: **Flipchart** responses. ***Click to build slide animation for responses.*** **Review** common barriers presented on slide.

20 Minutes	What if Performance doesn’t improve?
	Common Performance Issues
 oaching vs. Counseling	**Show slide 59.** **Say:** Let’s discuss the difference between coaching and counseling. In this course, we use the term **coaching** when supporting Provider Representatives who are willing and able to improve, while the term **counseling** has been used to refer to situations when the Provider Representative is unaware of, or unconcerned about, the consequences of the behavior.
 **Counseling Process** **Slide 60**	**Show slide 60** **Say:** We can look at this from a process perspective. Focusing on the behavior(s). Once the Provider Representative recognizes the problem, the Supervising Manager can return to coaching rather than counseling. With at “Impact on Others”, continue your focus on specific behaviors. If employee behavior did not change, it may be time to alert your Director about the situation. When discussing the consequences, they must be real consequences, not threats, and you must be prepared to carry out consequences. Human Resources should be notified if behavior has not changed. If necessary, you may have to take disciplinary action with the Provider Representative, up to and including termination. Hopefully, it will not come to this. You are rooting for the employee to change behavior, but if they do not change, you need to take the appropriate action. Remember, do not make judgments, and concentrate on behavior(s) that are not meeting standards.

20 Minutes	What if Performance doesn't improve?
	Common Performance Issues
 **If Performance Doesn't Improve** **Slide 61**	**Show slide 61** **Say:** It is possible that unsatisfactory performance, while not the Supervising Manager's "fault," may be enabled by using the wrong coaching style. If you haven't already, first try Directive coaching. Document to support your observations, as these will be needed in order to provide the Provider Representative with clarity about the issues, and to support HR/or legal action that might need to be taken in the future. If no improvement occurs, you may need to create a Performance Improvement Plan (PIP) in consultation with HR and your Manager. Monitoring results within the time frame in which the PIP is active will be critical. The bottom line is: as Manager and Coach, you need to Manage them up or manage them out to a role where there is a better fit or out of the organization altogether. **Ask:** Has anyone had any experience with a PIP? What questions do you have?

Section 9: WORKSHOP SUMMARY

10 minutes	**Workshop Summary**
	Key Concepts
 **Workshop Summary**	**Show slide 62** **Say:** Let's take the last few minutes to sum up what we've covered.
 **Key Concepts**	**Show slide 63** **Review** key concepts: • Plan – Implement – Evaluate framework • Performance Readiness by Task • Three styles of coaching

10 minutes	**Workshop Summary**
	Key Concepts
 **Ongoing Coaching and Feedback**	**Show slide 64** **Say:** Reinforce the importance of coaching and feedback as a critical ongoing process throughout the year, one which helps Provider Representatives navigate effectively from setting objectives to the Year-End Review. **Ask** Participants to take a few minutes to complete the Action Planning worksheet in the Participant Guide (Do more of, Start doing, Stop doing).
 **Thank You**	**Show slide 65.** **Thank** Participants for their input and cooperation.

Section 10: APPENDIX: Flipcharts and exercises

List of

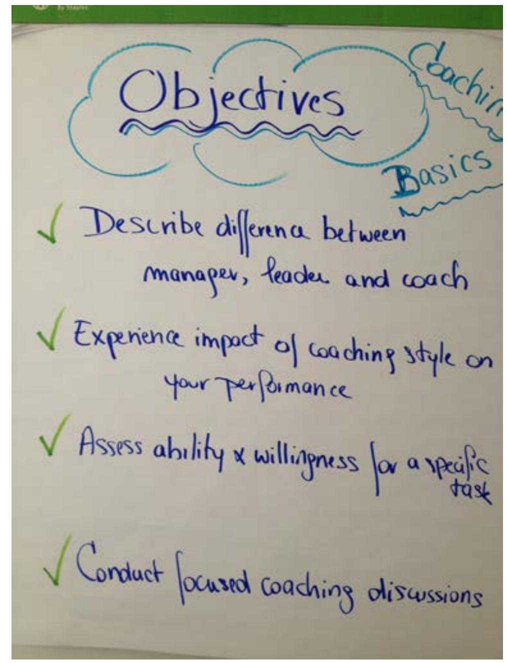
PREPARE UPFRONT!!

Flipchart

Please prepare following flipcharts for reference during the workshop:

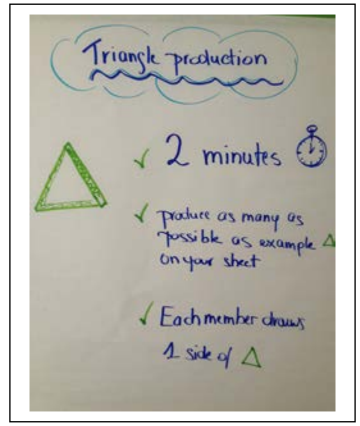
Flip 1: Course Objectives

- ✓ Describe difference between manager, leader and coach
- ✓ Experience impact coaching style on one's performance
- ✓ Assess ability and willingness for a specific task
- ✓ Conduct focused coaching discussions

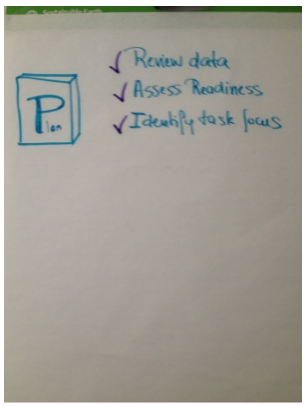


Flip 2: Triangle production exercise (goes with slide 10)

- In 2 minutes
- Produce as many Traingles as possible
- Each member draws 1 side of the triangle

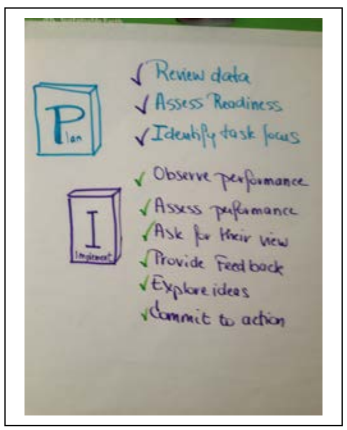


Flip 3: The PIE process (goes with slide 14-15-21 and 54)



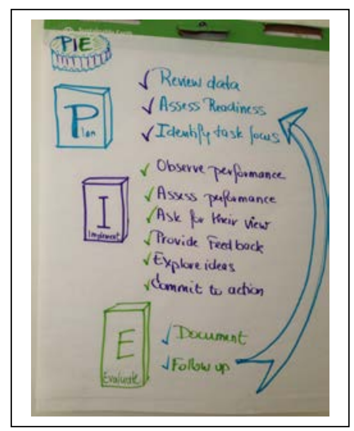
PLAN:

- ✓ Review data
- ✓ Assess Readiness
- ✓ Identify task focus



IMPLEMENT:

- ✓ Observe Performance
- ✓ Assess Performance
- ✓ Ask for their view
- ✓ Offer Feedback
- ✓ Elicit Ideas
- ✓ Commit to action



EVALUATE:

- ✓ Documet
- ✓ Follow up

PREPARE UPFRONT!!

Materials for Exercises throughout the workshop:

Activity Name	Slide #	Facilitator Guide page	Materials needed
Fast Fact Finder: Icebreaker	2	7	open space & instructions - small gift (lolly?) for winner
Your Roles	6	9&10	flipchart or big post it - timer (2 minutes)
3 different roles	7	11	Participant workbook page 6
Break up in groups of 3	after 8	13	open space to line people up
Triangle production	9	13	Prepared Flipchart 2 - stock of triangle production sheets pens - ruler or straight object - timer - tape.
Drivers task focused	16	22	Place mats - driver task cards
Competencies - > Behaviors	17	23	post its and pens to write down tasks to coach
combine 2 previous exercises	19	24	laminate map - post it with tasks to coach
TRIZ after slide 24	24	27	TRIZ: how to make a feedback session aweful?
judgment/observable behavior	27	28	Facilitate quiz and ask to make it a behavior
Facilitate discussion VC	28	29	videoclip needs adjustments?
Role Plays (4 types of C Styles)	49 - 52	39 - 44	Participant workbook p11 -
Performance issues	56	47	brainstorm performance issues on Flip

Coaching Basics

PSI Managers & Supervisors

Introductions

Optional: Any appropriate icebreaker is good

Fast Fact Finder

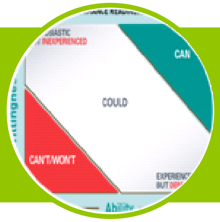
- Find at least one person who …
  - Is from a different place?
  - Has same birthday month?
  - Manages same number of direct reports as you?

Post It

Workshop Objectives

Describe how the roles of Leader, Manager, and Coach are different and complementary.

Identify how a Manager's coaching style impacts Representative performance.



Assess a Representative's Ability and Willingness to perform a specific task effectively.

Conduct a focused coaching conversation based on observable behaviors that results in a commitment to action.

Flipchart

Agenda

TOPIC	TIME
Introductions and Understanding Your Roles	30 minutes
Triangle Production Exercise (if enough participants)	30 minutes
Coaching: What and How	40 minutes
Break	20 minutes
How to Implement Coaching	60 minutes
Coaching skill Practice: case 1	30 minutes
Lunch Break	60 minutes
Coaching Skills Practice: Case Study 2 & 3 Role-Plays	90 minutes
Break	15 minutes
Coaching Skills Practice: Case Study 4 Role-Plays	30minutes
Evaluate Ongoing Progress	15 minutes
What if Performance Does not Improve	30 minutes
Conclusion	10 minutes

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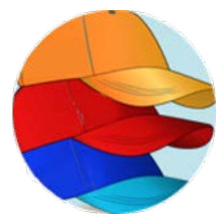
Your Roles



Same Tasks, Different Focus

1. Decide what needs to be done.
2. Create networks and relationships to achieve the goals.
3. Ensure that people actually do the work.

Copes with
change

Copes with
complexity

Copes with
capabilities

Discussion

Which Hat? What Action?

Think of a current challenge you face at work.

What can you do to address this issue
from the perspective of your three different roles?

As a Leader, I would …?

As a Manager, I would …?

As a Coach, I would …?

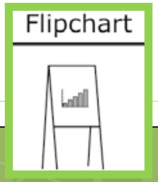
Three Complementary Roles

- One role is not better than another.
- One role is not replaced by another.
- Each role is different and necessary.

Triangle Production Exercise

- Three groups
- One group in the room at a time
- Goal:

  Achieve results according to the criteria your Manager shares with you



Coaching

What and How?

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What is Coaching?

An ongoing process in which Supervising Managers and Provider Representatives discuss how to **develop** and effectively **apply** job-related skills.

Copes with
capabilities

- Coaching is driven by the Supervising Manager's ability to provide **targeted feedback to reinforce, enhance, or correct behaviors** that impact the Provider Representative's performance.

- Coaching is not a single event and is not limited to field visits.

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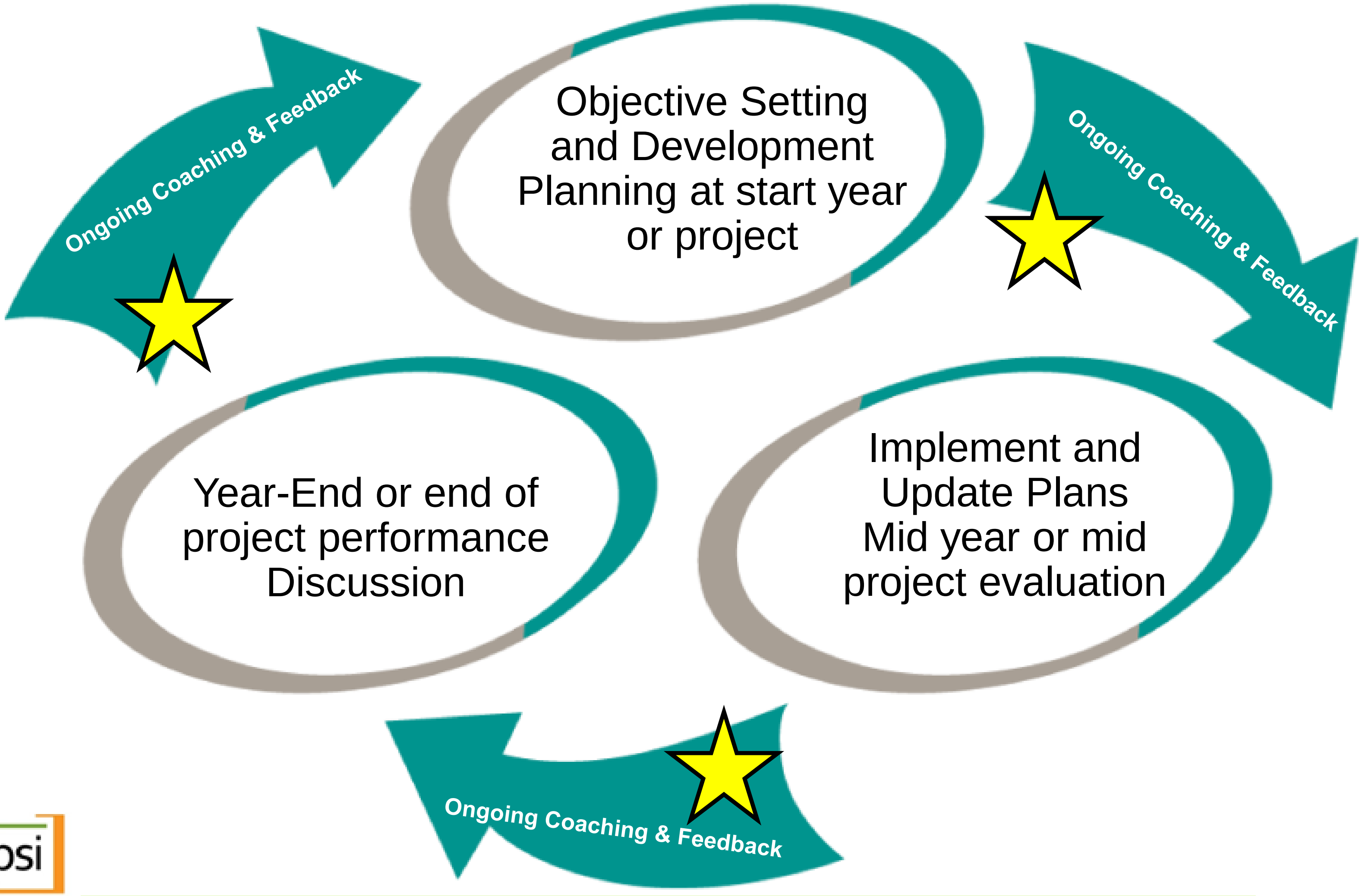
Performance Management



How Do You Coach?

Develop a focused PLAN.

P

IMPLEMENT coaching.

I

EVALUATE Representative's ongoing progress.

E

psi

How Do You Plan for Coaching?

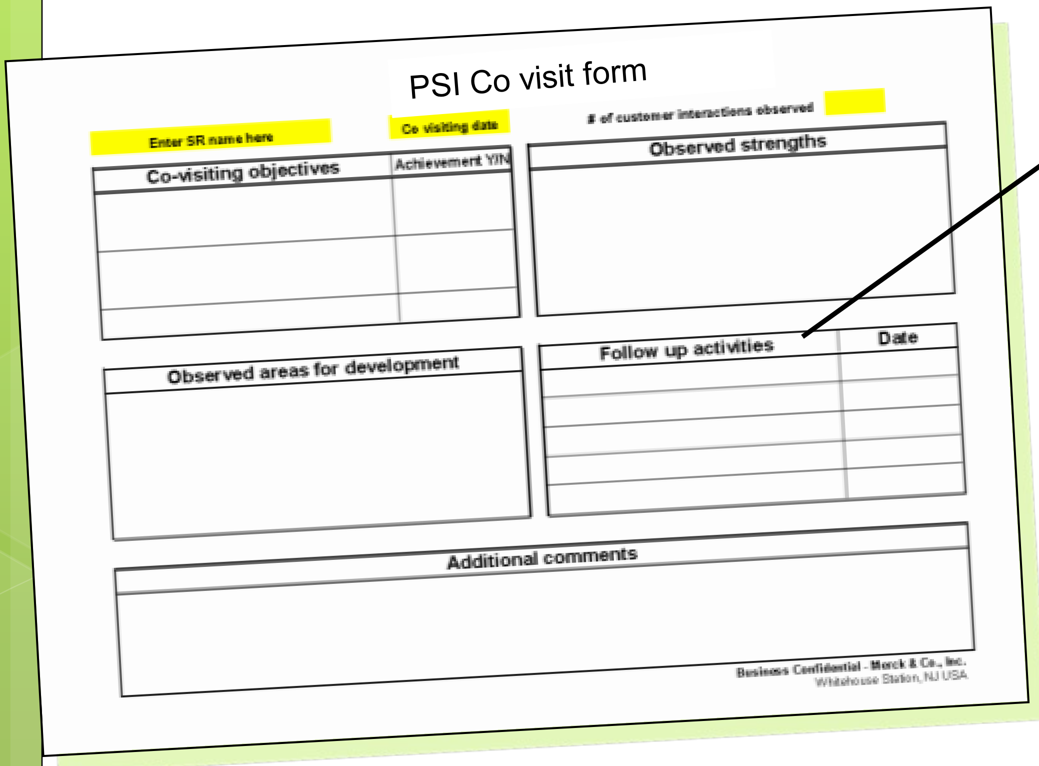
1. Review data
2. Assess readiness
3. Identify task focus

Develop a focused PLAN.

P

psi

Review Data



PSI Co visit form

Enter SR name here

Co visiting date

# of customer interactions observed

Co-visiting objectives | Achievement Y/N

Observed strengths

Observed areas for development

Follow up activities | Date

Additional comments

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Whitehouse Station, NJ USA

What has happened since the last coaching opportunity?

- PBCC Co-visiting Reports
- Manager notes
- Sales and activities results
- Progress on previously agreed-upon actions
- MBO (objectives)
- Provider plans

How is Your Driving?

NEEDS DEVELOPMENT

OUTSTANDING?

FULLY PERFORMING

Competencies, Skills, Tasks, Behaviors

Competency: 1:1 Provider Behavior Change Communication

Skill: move up in adoption continuum

Task:

Open and identify needs focused on the target client population

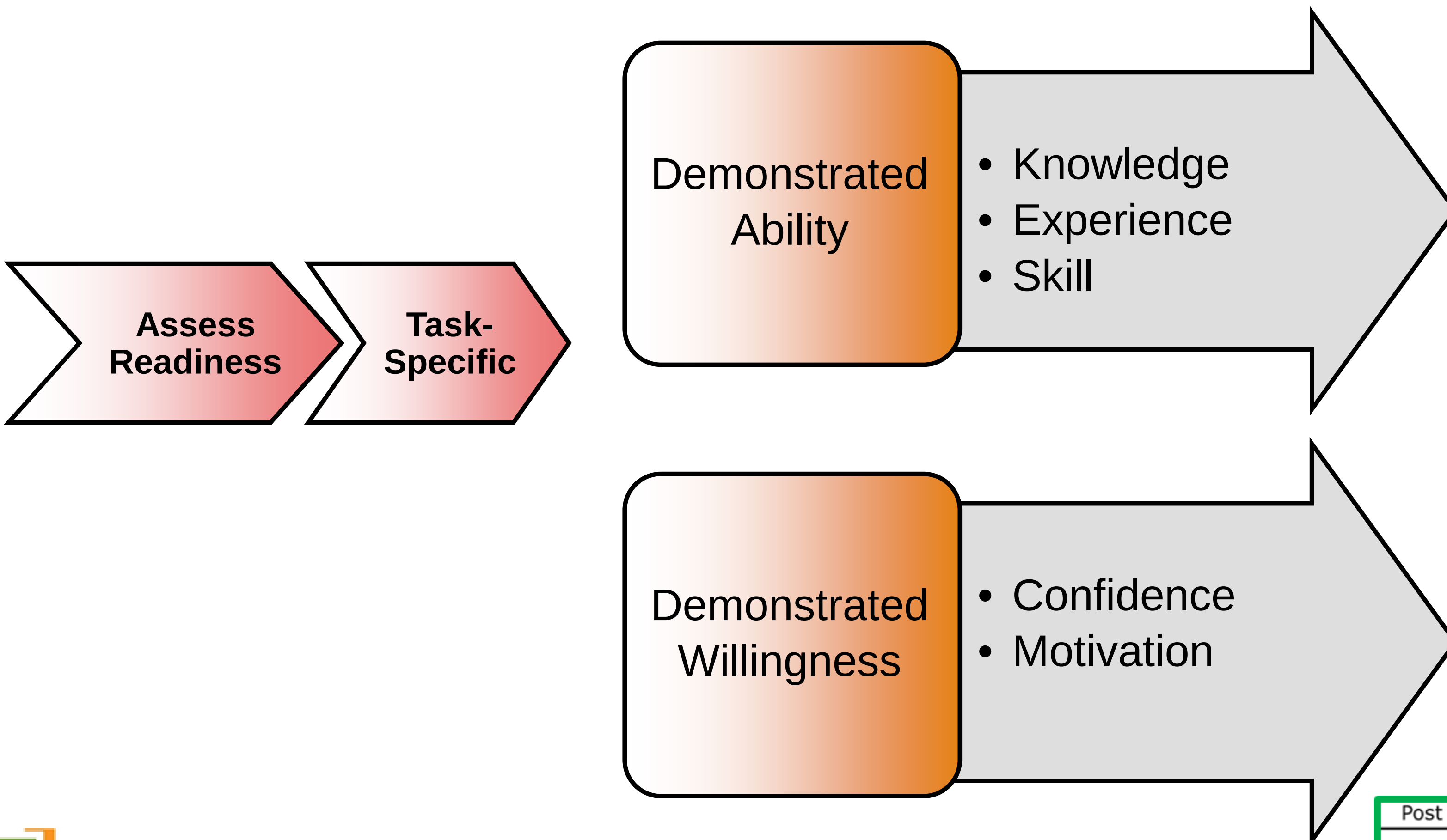
Behavior:

"During our last conversation we were discussing challenges in malaria treatment …"

psi

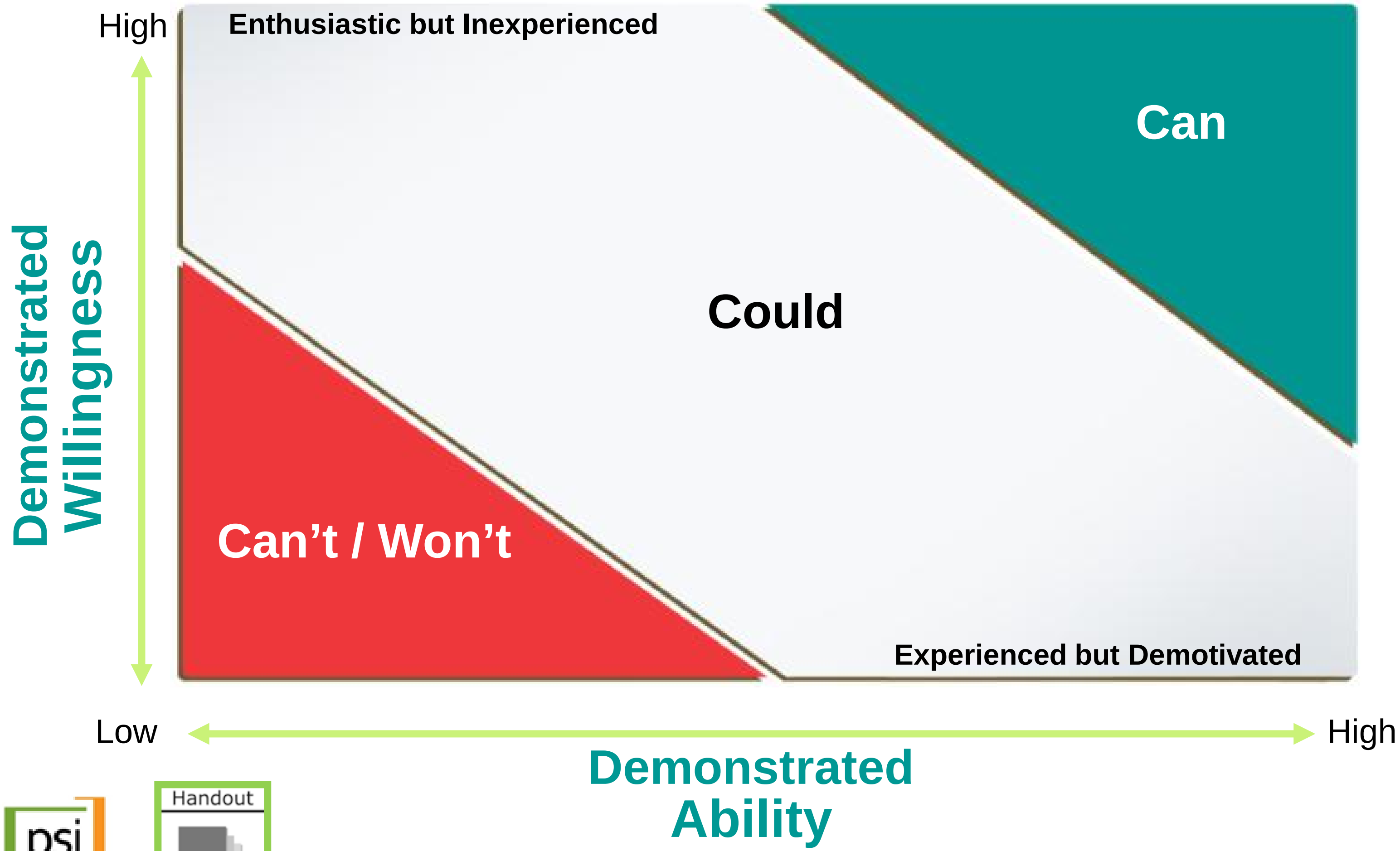
Post It

Assess Performance Readiness



Post It

Performance Readiness Levels by Task



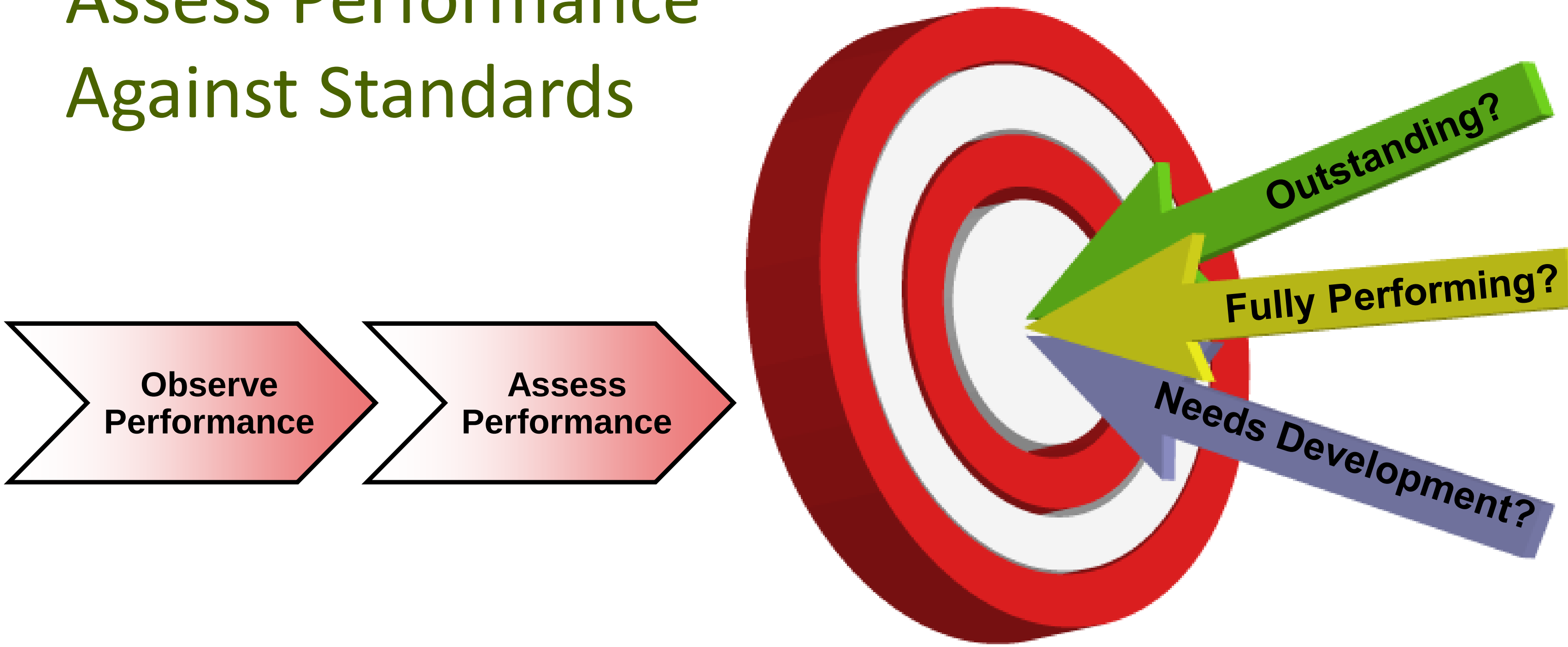
How Do You Implement Coaching?

- Observe performance
- Ask for their view
- Offer feedback
- Explore ideas
- Commit to action

IMPLEMENT coaching.

Post It

Assess Performance Against Standards



Agree on Performance Standards for:

- PBCC Skills
- Territory management (targeting & segementation
- Medical (project) knowledge
- ....

Post It

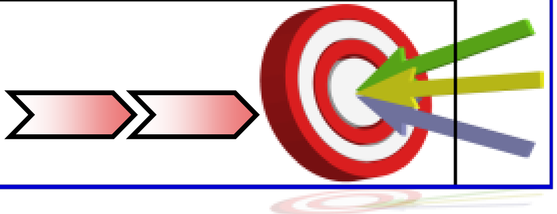
Co-visiting objectives	Achievement Y/N
e.g. PBCC: Adjust message to adoption ladder e.g. PBCC: closing and commit next steps	
collaboration with didi's: how the coach them?	
Territory management: screening new providers	

Observed strengths

Observed areas for development

Follow up activities	Date

Additional comments



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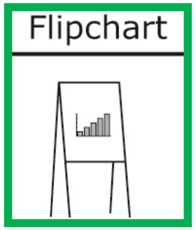
What are the behaviors you dislike, receiving feedback?



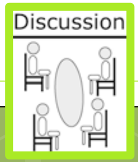
Successful Feedback

Feedback is Based on Observable Behaviors

Judgments	Observable Behaviors
subjective	word / actions
personal bias	see it
prejudices	hear it
reactions	evidence of it
assumptions	others agree

Judgments or Observable Behavior?

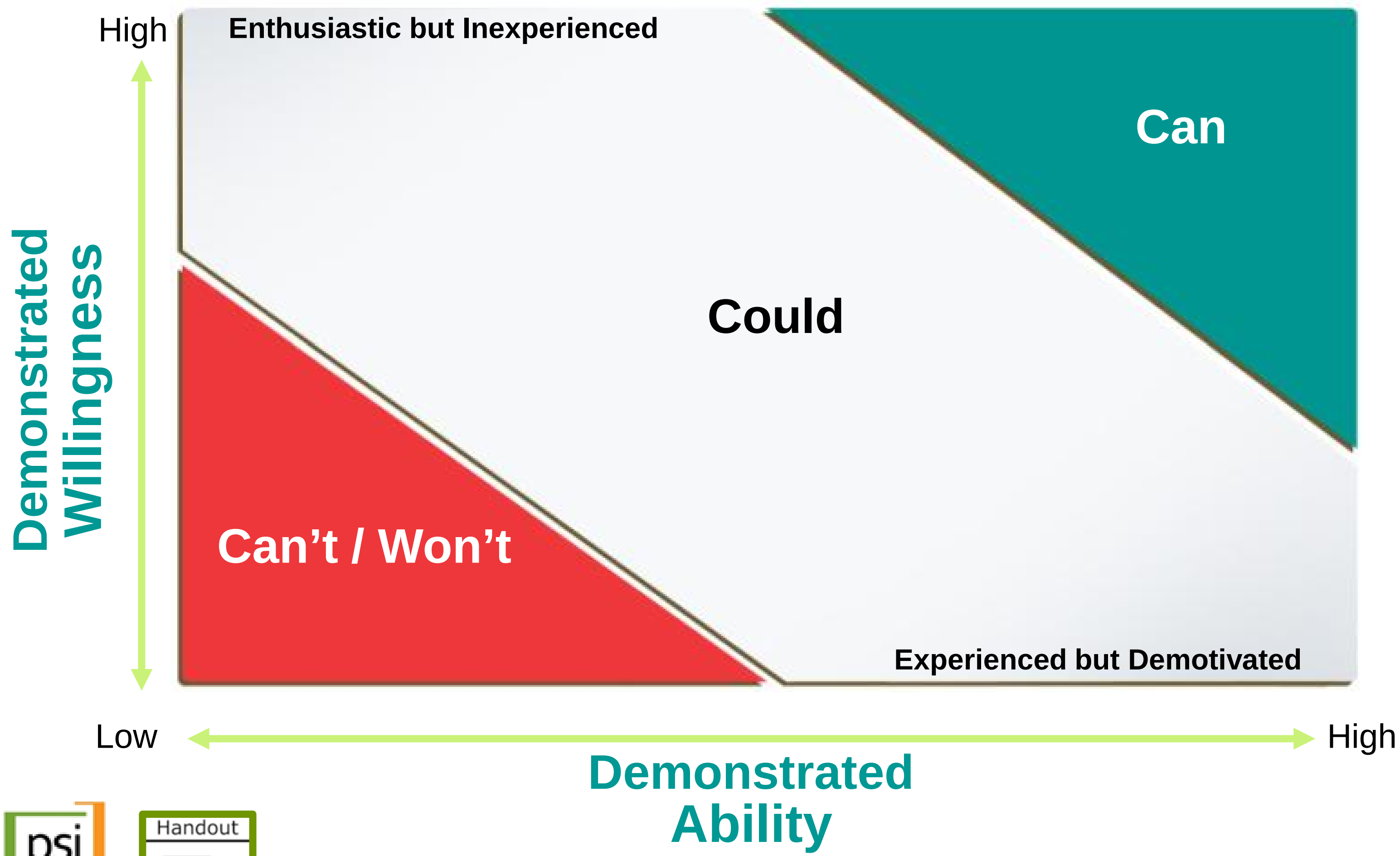
- "Ivan is resistant to change."
- "She doesn't really understand the commercial model."
- "He talks more than he listens."
- "That closed question showed that you understood the provider's point."
- "You had great body language during that call."
- "Your key messages were not convincing."
- "Your key messages were supported by data."
- "You were doing fine, then you blew the closing."



Observing Behavior Skills Practice

Coaching Styles

Performance Readiness Levels by Task



Can’t Performance Behaviors

Needs to Learn the Basics

- Lacks skill and experience
- Not sure how to move forward
- Lacks confidence
- May be unaware of a performance issue

Directive

High Guidance

psi

Directive Coaching Style: High Guidance for Can't

- Provide specific direction about what and how.
- Describe what they most need to learn.
- Team the Rep with an experienced peer and / or meet regularly to provide feedback.
- Provide opportunities to practice and any training needed to build skills.
- Offer encouragement and positive feedback and express confidence, when appropriate.
- Check in regularly with Representative.

Won't Performance Behaviors

Needs to Turn Around

- Unacceptable or marginal performance
- Does not own the performance issue
- Tends to be defensive, challenging

Directive

High Guidance

Directive Coaching Style
Highest Guidance for Won't

- Clearly communicate need for improved performance against standards.
- Describe consequences of failure to improve.
- Closely supervise performance improvement efforts.
- Contact HRBP and Next Level Manager.
- Provide a written action plan describing specific performance expectations that must be met within a specified time frame.

ve” Sound Like?

Can Performance Behaviors

Needs to Stretch

- Makes optimal decisions on how to get results
- Develops fresh approaches to meeting Provider needs
- May assist in development of other Representatives
- Proactively alerts you to problems and opportunities

Encouraging

High Support

psi

Encouraging Coaching Style
High Support

- Outline and clarify desired outcomes.
- Let employee decide on what and how.
- If asked, share ideas or best practices.
- Run interference and eliminate barriers.
- Continue to offer feedback.

What D “Encouraging” Sound

“It sounds like you have a good handle on this. Just keep me informed on what you and your counterparts are doing so there are no surprises, and by all means, let me know how I can help you out.”

Could Performance Behaviors:

Inexperienced but Enthusiastic

Needs to Expand Skills

• Asks questions, seeks clarity
• Enthusiastically takes on more than he / she can handle
• Delivers results, may have setbacks

Participative

Balanced Guidance and Support

psi

Participative Coaching Style
Moderate Guidance and High Support

- Ask employee how he/she would approach the situation; support employee's ideas when possible.
- Modify ideas and suggest other approaches or resources, as appropriate.
- Set realistic limits for employee's efforts at new tasks.

Could Performance Behaviors:

Experienced but Demotivated

Needs to Engage

- **Avoids taking initiative, avoids Manager**
- **Lack of motivation overshadows ability**
- **Has negative influence on team collaboration**

Participative

Balanced Guidance and Support

Participative Coaching Style
Balanced Guidance and Support

- Discuss and clarify mutual expectations with regard to initiative or "checking in."
- Discuss how behavior impacts team/individual performance and provide examples.
- Determine if employee needs more direction or if they can improve behavior on their own.
- Explore root causes and agree to needed changes.

W… “…rticipative” Sound

“Now that I’ve explained the general direction I think we need to take, I’d be interested in hearing your honest critique so that we can include any alternative suggestions you might have that would improve the plan.”

Lunch

60 Minutes

Coach O.F.T.E.N.

Implement coaching.

O OPEN
- Establish purpose and tone
- Ask for their view

F FOCUS
- Focus on one to three tasks to discuss

T TRANSITION
- Offer feedback
- Describe observable behaviors, benefits

E ENGAGE
- Explore ideas for improvement, development

N NEXT STEPS
- Commit to action

Coaching Skills Practice

psi

Pictures need to be adjusted to countries

Role-Play Guidelines

- Groups of three
  - Manager
  - Representative
  - Recorder or observer
- Plan the coaching conversation together
- Role-play
- Discuss
  - What was hard; what was easy?
  - What impact was there?
  - What would you do differently next time?

Case Study #1: Isabelle

- **Years in role:** 12
- **Title:** PSI Provider Representative
- **Last promoted:** Interviewed for a position as supervisor but was not selected
- **Past performance:** Well above objectives years ago, but has fluctuated between average or above objectives; five years ago was considered as innovator in approach to customers
- **Current performance:** Barely at objectives
- **Task to be assessed:** Identify / confirm provider needs
- **Recent observation(s) related to this task:**
  - Low active listening to provider
  - Often interrupts customer dialogue with key messages
  - Long history with some previous providers is apparent, but does not consistently yield new opportunities
  - Tends to demonstrate impatience with new provider team members
  - Over relies on product knowledge in provider interactions
  - Usually asks closed questions
  - Inconsistently reaches out to other office members
- **Business impact of performance:** Focus on a single solution rather than an expanded portfolio limits provider engagement and results

Case Study #2: Marlena

- **Years in role:** Nine months
- **Title:** PSI Representative
- **Last promoted:** Recent internal transfer; background in data analysis management in Medical dept.; no prior sales experience
- **Past performance:** Usually meeting objectives
- **Current performance:** Improving results; too early to rank
- **Stakeholder feedback:** "Seems eager to learn and easy to like"
- **Task to be assessed: PBCC:** Ask relevant open questions & active listening

- **Recent observations related to this task:**
  - Demonstrates interest in all physician office staff members
  - Establishes positive relationships with customers in a short period of time
  - Still learning to offer customers services helping to use PSI products in targeted clients' types
  - Exhibits a healthy balance of sharing and soliciting ideas in meetings
  - Asks a lot of questions about how best to use the portfolio of products' resources and often has disease education questions

- **Business impact of Marlena's performance:** Positive results with strong potential for DALY's growth in territory if able to increase skill in linking Provider needs to PSI products and solutions

psi

BREAK

Case Study #3: David

- **Years in role:** Four
- **Title:** PSI Representative

- **Past sales performance:** Exceeded objectives; was nominated for Rep of the year award two years in a row
- **Current sales performance:** Well above objectives to date

- **Stakeholder feedback:** Positive comments from peers around sharing best practices in district meetings
- **Task to be assessed:** Sharing information
- **Recent observations related to this task:**
    - Demonstrates an excellent understanding of territory and in-depth knowledge of key accounts
    - Appropriate use of probing questions in provider interactions
    - Able to convert provider's expression of concerns into an opportunity to extend the dialogue
    - Facilitated a meeting with providers at a very large office; did a superb job of discussing his products with the entire clinical staff and engaging them all in the conversation
    - Exhibits genuine confidence in PSI products and solutions

- **Business impact of David's performance:** Performance with key providers has translated into opportunities to engage with some previously reluctant opinion leaders.

psi

Group Work

Case Study #4: Stefan

- **Years in role:** Four
- **Title:** Product Specialist

- **Past Sales performance:** Below or at objectives
- **Current sales performance:** Below objectives since introduction of current organization structure

- **Stakeholder feedback:** Sometimes combative with peers in team meetings and reluctant to share information

- **Task to be assessed:** Achieve provider's commitment and do follow up

- **Recent observations related to this task:**
  - Lack of planning evident in random interactions without taking into account the adoption stairway
  - Had not followed up with commitments made in last visit
  - Offers a mix of personal stories and data-supported information in each interaction
  - Unable to offer the informed choice
  - Blames change in territory for downward trends in results
- **Business impact of Stefan's performance:** Lack of positive trust development within providers

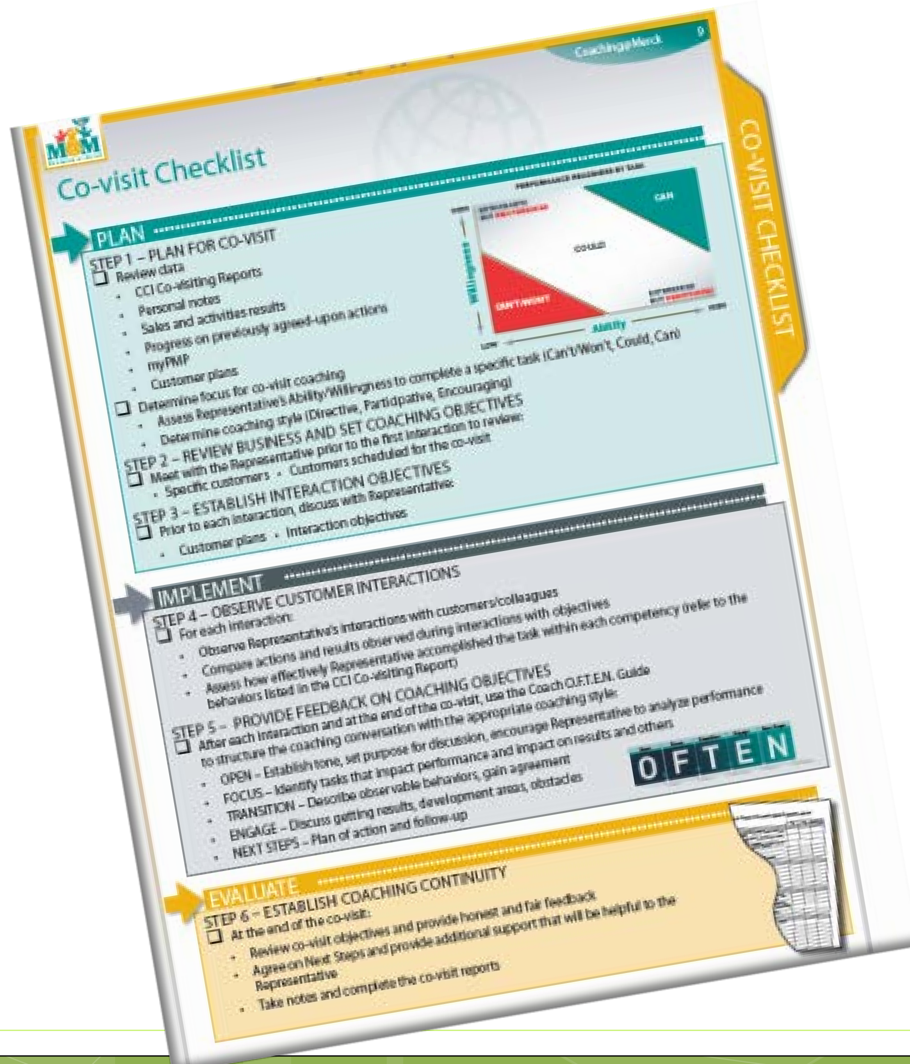
How do you Evaluate Progress?

- Document
- Follow-up

EVALUATE Coachee's ongoing progress.

E

Evaluate Ongoing Progress



Coaching@Merck 9

Co-visit Checklist

CO-VISIT CHECKLIST

PLAN

STEP 1 – PLAN FOR CO-VISIT
- ☐ Review data
  - CCI Co-visiting Reports
  - Personal notes
  - Sales and activities results
  - Progress on previously agreed-upon actions
  - myPMP
  - Customer plans
- ☐ Determine focus for co-visit coaching
  - Assess Representative's Ability/Willingness to complete a specific task (Can't/Won't, Could, Can)
  - Determine coaching style (Directive, Participative, Encouraging)

STEP 2 – REVIEW BUSINESS AND SET COACHING OBJECTIVES
- ☐ Meet with the Representative prior to the first interaction to review:
  - Specific customers
  - Customers scheduled for the co-visit

STEP 3 – ESTABLISH INTERACTION OBJECTIVES
- ☐ Prior to each interaction, discuss with Representative:
  - Customer plans
  - Interaction objectives

IMPLEMENT

STEP 4 – OBSERVE CUSTOMER INTERACTIONS
- ☐ For each interaction:
  - Observe Representative's interactions with customers/colleagues
  - Compare actions and results observed during interactions with objectives
  - Assess how effectively Representative accomplished the task within each competency (refer to the behaviors listed in the CCI Co-visiting Report)

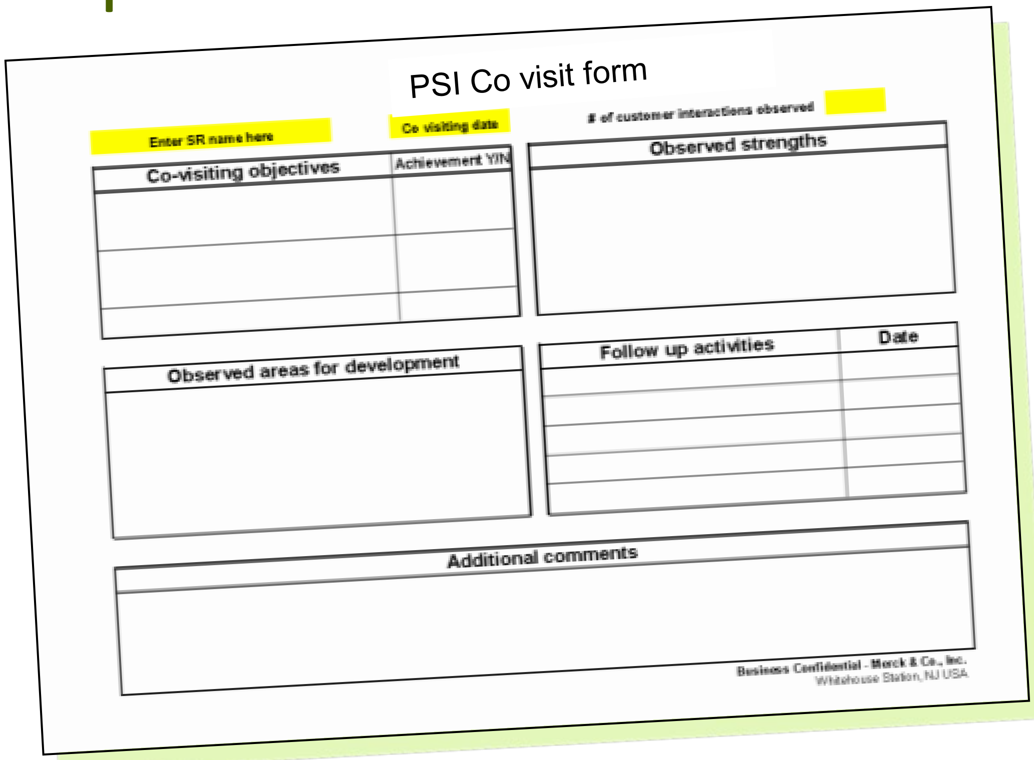
STEP 5 – PROVIDE FEEDBACK ON COACHING OBJECTIVES
- ☐ After each interaction and at the end of the co-visit, use the Coach O.F.T.E.N. Guide to structure the coaching conversation with the appropriate coaching style:
  - OPEN – Establish tone, set purpose for discussion, encourage Representative to analyze performance
  - FOCUS – Identify tasks that impact performance and impact on results and others
  - TRANSITION – Describe observable behaviors, gain agreement
  - ENGAGE – Discuss getting results, development areas, obstacles
  - NEXT STEPS – Plan of action and follow-up

O F T E N

EVALUATE

STEP 6 – ESTABLISH COACHING CONTINUITY
- ☐ At the end of the co-visit:
  - Review co-visit objectives and provide honest and fair feedback
  - Agree on Next Steps and provide additional support that will be helpful to the Representative
  - Take notes and complete the co-visit reports

Document Your Observations for Follow-Up



PSI Co visit form

Enter SR name here

Co visiting date

# of customer interactions observed

Co-visiting objectives	Achievement Y/N

Observed strengths

Observed areas for development

Follow up activities	Date

Additional comments

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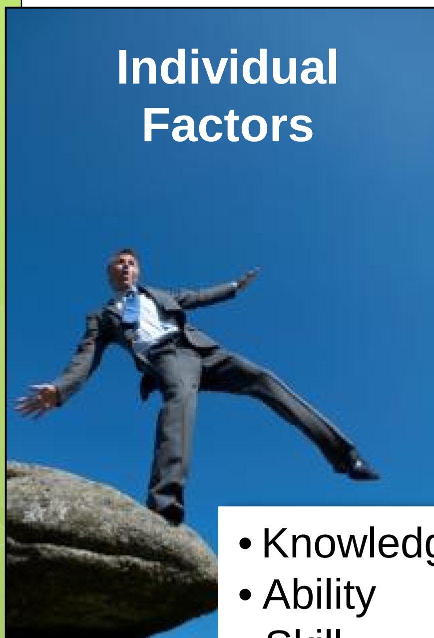
Handout

What if Performance does not Improve?

Coaching ⬄ Counseling:

Root Causes:
Within or Beyond Control?



Individual Factors

- Knowledge
- Ability
- Skill
- Motivation
- Commitment
- Health (physical or mental)
- Personal problems

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Environmental Factors

- Lack of sponsors
- Company processes
- Lack of communication exchange
- Changing business priorities

Common Manager Barriers

"It will be hard to replace her."

"His DALY's are OK."

"I like him – I don't want any hard feelings."

"Giving feedback makes me uncomfortable."

"I'm not sure who to contact for help."

"I'm not sure how to implement a PIP."

"She has a family to support."

"It's too much documentation!"

"I inherited him and he deserves a clean slate!"

"The last Manager didn't deal with him, why should I?"

"What impact will this have on her career?"

"What will my peers think of me?"

"What will the other Representatives in the district think?"

"I can coach through this."

"He can't lose his job; it's a bad economy right now."

"It's too much hassle!"

"Maybe it's a phase; she'll improve on her own."

"I don't want to demotivate her."

Coaching vs. Counseling

Coaching

Provider Representative is willing and able to participate in performance improvement.

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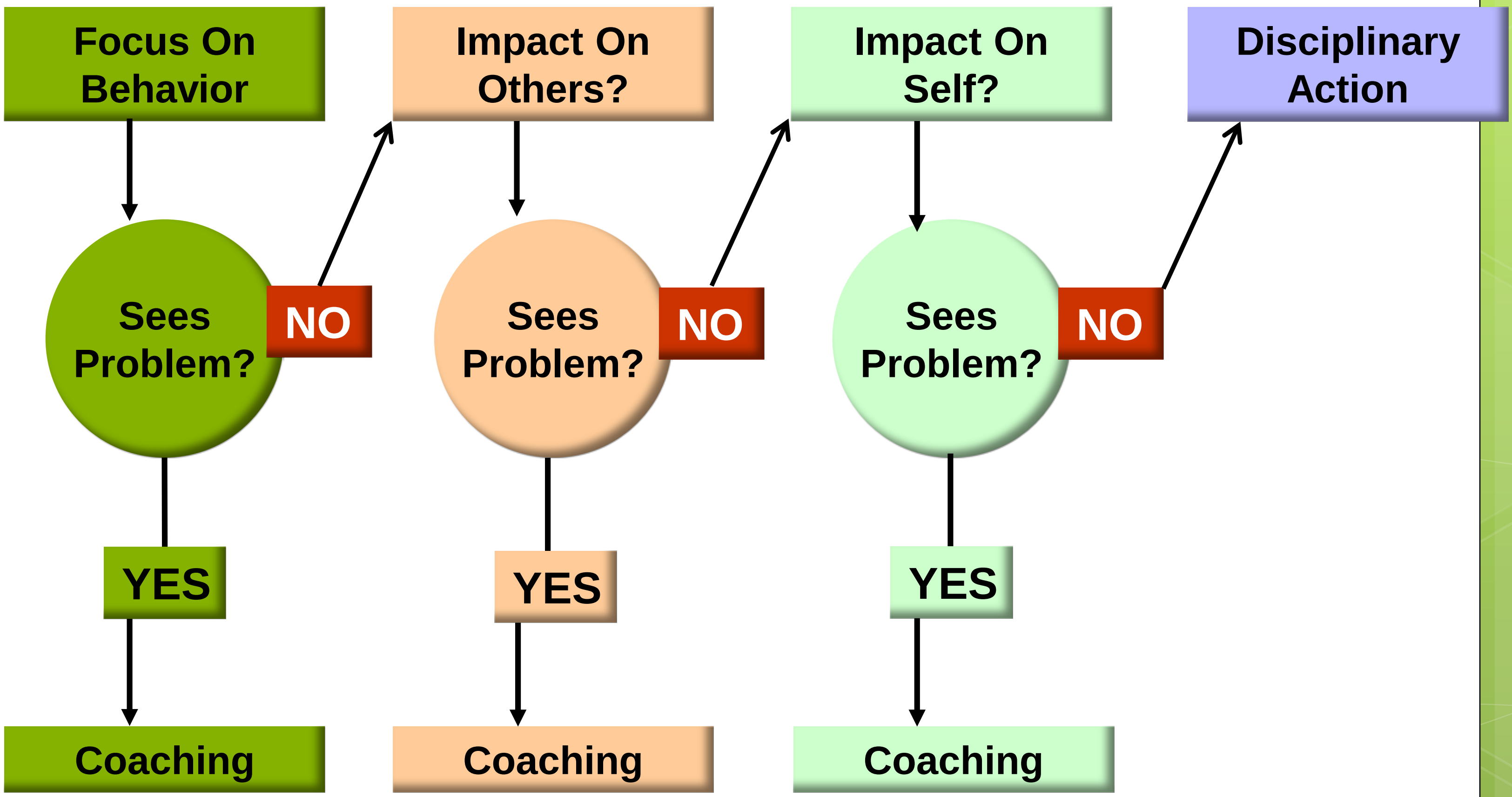
Counseling

Provider Representative needs assistance; needs help to r… nize problem, … willing/able to …nprove performance.

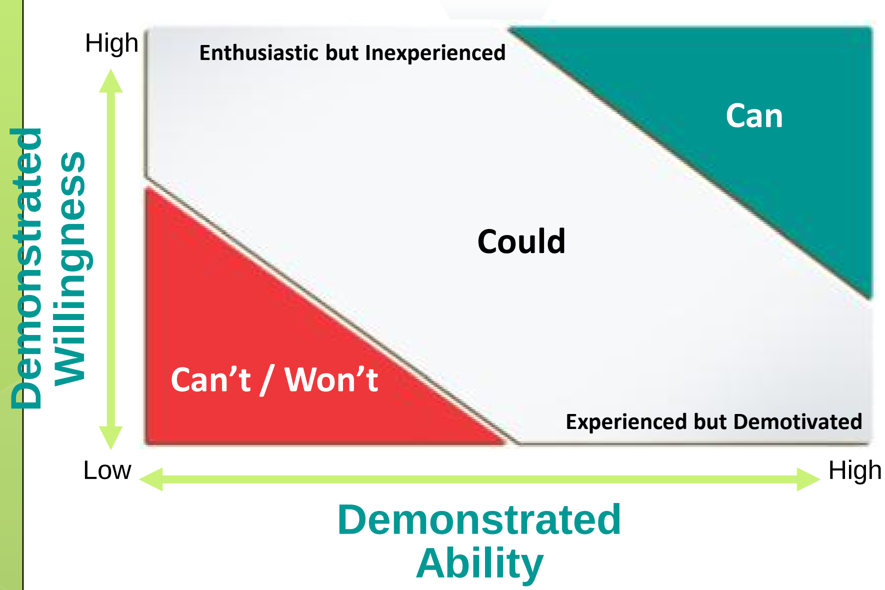
Counseling Process



If Performance Doesn't Improve

- First, try Directive coaching / counseling.
- Document to support your observations!!
- If no improvement, create a Performance Improvement Plan (PIP).
- Consult with HR and your Manager.
- Monitor results within the PIP.
- Manage up or manage out.

Coaching Workshop Summary



Develop a focused PLAN.

P

IMPLEMENT coaching.

I

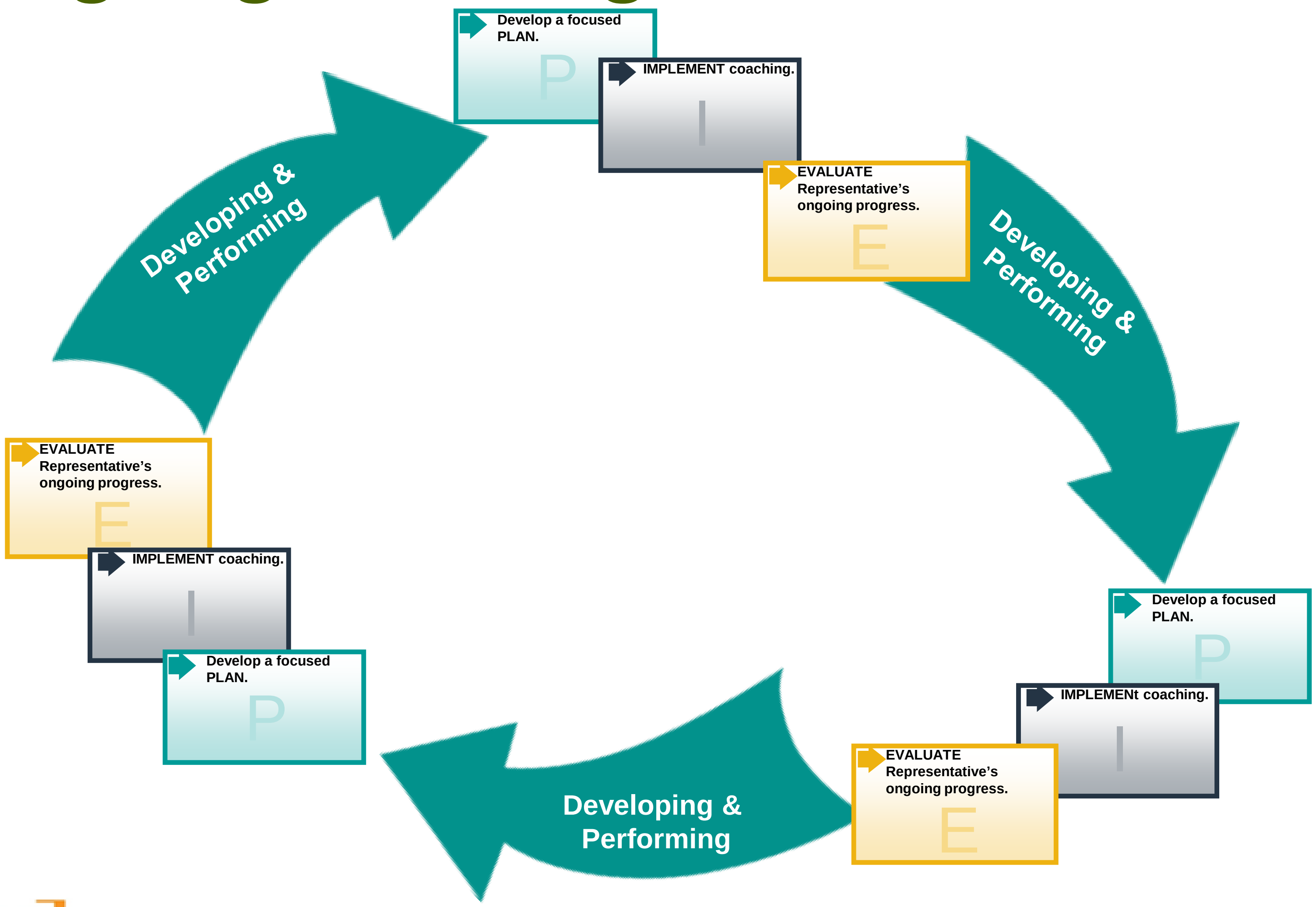
EVALUATE Representative's ongoing progress.

E

Match Your Coaching Style

DIRECTIVE **PARTICIPATIVE** **ENCOURAGING**

Ongoing Coaching and Feedback



Thank you!

Coaching Basics

PSI Managers & Supervisors

COACHING BASICS

PSI Participant Workbook

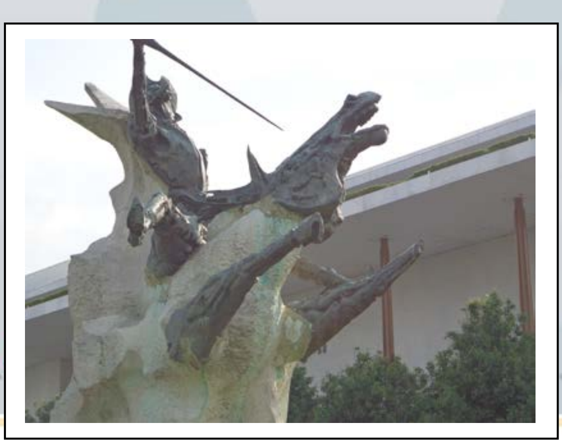


Table of Contents and Workshop Objectives

Table of Contents

Workshop Objectives

- Describe how the roles of Leader, Manager, and Coach are different and complementary.
- Understand how Supervising Manager's coaching style impacts Provider Representative's performance.
- Assess a Provider Representative's Ability and Willingness to complete a specific task effectively.
- Conduct a focused coaching discussion based on observable behaviors that result in a commitment to action.

Your Roles: Leader

Focus __________________________

The Leader's focus is change.

- In today's evolving business environment—which includes technological advances, workforce demographic shifts, increased global competition, increased and/or decreased regulation—major changes are more and more necessary to survive and compete effectively.
- More change requires more leadership.

Actions of a Leader

- Sets a direction by developing a vision
- Identifies strategies for producing the changes needed to achieve the vision
- Aligns people with the vision – builds their commitment to achieving it
- Motivates and inspires people to keep moving in the right direction even in the face of obstacles

Adjectives

Authentic, creative, credible, confident, courageous, ethical, innovative, optimistic, passionate, trustworthy

Your Roles: Manager

Focus ________________________

The Manager's focus is complexity.

- Organizations can become chaotic simply because of their size.
- Good management brings a degree of order and consistency to key dimensions like the quality and profitability of the products and services rendered.

Actions of a Manager

- Sets targets and goals
- Establishes plans to achieve the targets
- Allocates resources to achieve the plans
- Puts in place systems to monitor plan implementation (create if needed)
- Staffs jobs with qualified people
- Communicates plans
- Delegates responsibilities
- Monitors results to plans
- Problem solves as needed

Adjectives

Collaborative, decisive, focused, organized, proactive, responsive, results-oriented, risk-taker, resilient, tactical

Your Roles: Coach

Focus ___________________________

The Coach's focus is capabilities.

- To deal with all of the necessary change organizations, they need to be agile in regard to developing new or different skills.
- A Coach equips people with the tools, knowledge, and opportunities they need to be capable and effective as the environment evolves.

Actions of a Coach

- Communicates expectations and behaviors
- Observes performance
- Provides actionable feedback
- Works one-on-one with individuals
- Guides people to learn for themselves
- Orchestrates resources and opportunities

Adjectives

Calm, candid, competent, flexible, friendly, objective, persistent, resourceful, respectful, supportive

Leader, Manager, Coach: Application Activity

Think of a current challenge you face at work.

What can you do to address this issue from the perspective of your three different roles?

My Challenge: ______________________________

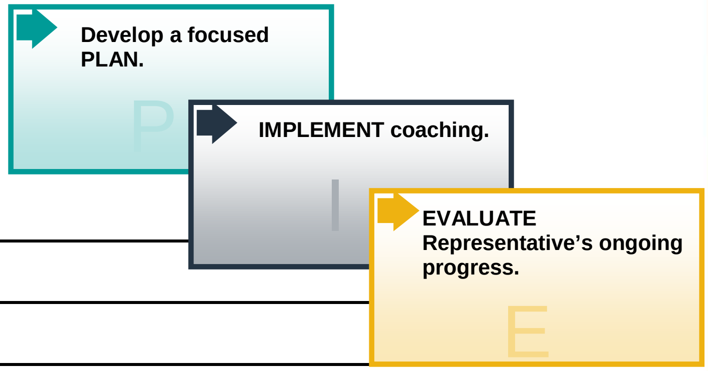
As a **Leader**, I would________________________________

As a **Manager**, I would ________________________________

As a **Coach**, I would ________________________________

Notes

How to Coach: Plan-Implement-Evaluate



Notes

How to Coach: Plan

Develop a focused PLAN.

P

Notes

How to Coach: Implement

IMPLEMENT coaching.

Notes

How to Coach: Evaluate

EVALUATE Provider Representative's ongoing progress.

E

Role-Play 1 Guidelines

- Work together in groups of three to **PLAN** the coaching conversation using the **Coaching Conversation Worksheet (page 14)** and **Recorder Checklist (page 16)**.
- Conduct the role-play with each person taking the role of:

Manager: . Adopt the appropriate coaching style for the Provider Representative. Use the **Coaching Conversation Worksheet** to structure your coaching conversation. Try to make your tone and word choices match your coaching style.

Representative: Adopt the appropriate persona of the described Provider Rep.

Recorder: Keep notes of the specific words used by the Supervising Manager to communicate the appropriate coaching style. Note what you felt worked and what may not have worked.

- Discuss:

  - What was hard; what was easy?

____

____

____

  - What impact was there?

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  - What would you do differently next time?

____

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____

Case Study #1: Isabelle

Scenario should be adapted to ensure relevancy to specific country context.

- **Years at PSI:** 7
- **Title:** Provider Representative
- **Last promoted:** Interviewed for a head office position but was not selected
- **Past performance:** Well above objectives years ago, but has fluctuated between average or above objectives; at the start, a firm supporter of PBCC, but lost focus
- **Current sales performance:** Barely at objectives
- **Stakeholder feedback:** "Sometimes causes tension with other team members who get tired of her constant complaining about provider's objections"
- **Task to be assessed:** Identify/confirm customer needs
- **Recent observation(s) related to this task:**
  - Inconsistent active listening to customer
  - Sometimes interrupts customer dialogue with key service messages
  - Long history with some previous customers is apparent, but does not consistently yield new opportunities
  - Makes statements blaming mobilizers for difficulty achieving results
  - Tends to demonstrate impatience with new team members
  - Over relies on product knowledge in customer interactions
  - Sometimes asks closed questions
  - Inconsistently reaches out to other office members
- **Business impact of Representative's performance:** Focus on a single product rather than offering informed choice limits customer engagement and results

Coaching Conversation Worksheet

Use the following questions to help you prepare for and plan your next coaching conversation with your Provider Representative, implement the coaching conversation effectively, and evaluate by documenting your observations in the Co-visiting Report, as appropriate.

PLAN - Prepare to Coach/Assess Readiness

Identify the specific task that you plan to discuss with the Provider Representative and select an appropriate coaching style.

What was the focus of your previous coaching conversation with the Provider Representative?

Based on your observation of the PBCC interaction, what is your Provider Representative's task-specific level of readiness? (Can't/Won't, Could, or Can)

Which coaching style will you apply?

- Directive – with those who Can't or Won't
- Participative – with those who Could
- Encouraging – with those who Can

IMPLEMENT - Observe and Provide Feedback

Focus your coaching conversations to positively reinforce effective performance and to facilitate any behavioral changes you expect.

O (Open)

What will you say to establish the appropriate tone and purpose for the coaching conversation?

F (Focus)

Based on your plan and your observations, what specific task performance do you most need to discuss during this coaching conversation? How will you communicate a clear Focus for the coaching conversation?

T (Transition)

How will you Transition to sharing the task-specific behaviors observed? (What did you hear? What did you see? What was the impact on the provider? What results were achieved?)

E (Engage – Directive, Participative, Encouraging)

What questions do you most need to ask the Provider Representative to understand his/her perspective?

What are the key behavioral messages you want the Provider Representative to take away from this coaching conversation?

Given these key behavioral messages, what do you most need for the Provider Representative to understand?

N (Next Steps)

What clear, measurable, and attainable Next Steps will you establish to improve or advance your Representative's performance of the tasks/skills focused on during this coaching conversation?

What are the time frames for the action steps you agreed upon in the coaching conversation? How will you follow up?

EVALUATE - Establish Coaching Continuity

Review co-visit objectives and provide honest and fair feedback. Complete the PBCC Co-visiting Report and note tasks that require follow-up coaching. How will you provide additional support that will be helpful to the Provider Representative?

Recorder Checklist: Participative Coaching

Directions: For each role-play, circle the "Yes" or "No" to reflect your observations about the "Manager's" ability to implement the Participative coaching style based on the observations you made during the role-play.

Did the "Manager"…	Did you observe this?	
Seek to understand the Provider Representative's perception of performance?	Yes	No
Review performance against standards (BPCC Standards, PSI Behaviors)?	Yes	No
Set a Participative tone?	Yes	No
Reinforce positive behaviors?	Yes	No
Focus the discussion on one to two tasks/behaviors and opportunities for development on those?	Yes	No
Ask open-ended questions?	Yes	No
Communicate behavioral observations, not judgments?	Yes	No
Ask the Provider Representative for ideas of what to do differently?	Yes	No
Help the Provider Representative develop an action plan?	Yes	No
Ask the Provider Representative to restate the agreed-upon action plan?	Yes	No
Restate key points of the conversation?	Yes	No
Offer ongoing support?	Yes	No

Role-Play 2 Guidelines

- Work together in groups of three to **PLAN** the coaching conversation using the **Coaching Conversation Worksheet** and **Recorder Checklist**. Conduct the role-play with each person taking the role of:
  - **Manager**: Adopt the appropriate coaching style for the Case Study Provider Representative. Use the **Coaching Conversation Worksheet** to structure your coaching conversation. Try to make your tone and word choices match your coaching style.
  - **Representative**: Adopt the appropriate persona of the Case Study Representative.
  - **Recorder**: Keep notes of the specific words used by the Manager to communicate the appropriate coaching style. Note what you felt worked and what may not have worked.
- Discuss:
  - What was hard; what was easy?

____

____

____

____

  - What impact was there?

____

____

____

____

  - What would you do differently next time?

____

____

____

____

Case Study #2: Marlena

- **Years at PSI:** Three
- **Years in role:** Nine months
- **Title:** Provider Representative
- **Last promoted:** Recent internal transfer; background in data analysis management in Medical dept.; no prior sales experience
- **Past performance:** Usually meeting objectives
- **Current sales performance:** Improving results; too early to rank
- **Stakeholder feedback:** "Seems eager to learn and easy to like"
- **Task to be assessed:** PBCC overall
- **Recent observation(s) related to this task:**
  - Demonstrates interest in all physician office staff members
  - Establishes positive relationships with providers in a short period of time
  - Still learning to offer provider services helping to use PSI products in targeted patients' profiles
  - Exhibits a healthy balance of sharing and soliciting ideas in meetings
  - Asks a lot of questions about how best to use the informed choice resources and often has education questions
- **Business impact of Provider Representative's performance:** Positive results with strong potential for growth in number of insertions if able to increase skill in helping provider to address patients objections to PSI solutions

Coaching Conversation Worksheet

Use the following questions to help you prepare for and plan your next coaching conversation with your Provider Representative, implement the coaching conversation effectively, and evaluate by documenting your observations in the Co-visiting Report, as appropriate.

PLAN - Prepare to Coach/Assess Readiness

Identify the specific task that you plan to discuss with the Provider Representative and select an appropriate coaching style.

What was the Focus of your previous coaching conversation with the Provider Representative?

Based on your observation of the customer interaction, what is your Provider Representative's task-specific level of readiness? (Can't/Won't, Could, or Can)

Which coaching style will you apply?

- Directive – with those who Can't or Won't
- Participative – with those who Could
- Encouraging – with those who Can

IMPLEMENT - Observe and Provide Feedback

Focus your coaching conversations to positively reinforce effective performance and to facilitate any behavioral changes you expect.

O (Open)

What will you say to establish the appropriate tone and purpose for the coaching conversation?

F (Focus)

Based on your plan and your observations, what specific task performance do you most need to discuss during this coaching conversation? How will you communicate a clear Focus for the coaching conversation?

T (Transition)

How will you Transition to sharing the task-specific behaviors observed? (What did you hear? What did you see? What was the impact on the provider? What results were achieved?)

E (Engage – Directive, Participative, Encouraging)

What questions do you most need to ask the Provider Representative to understand his/her perspective?

What are the key behavioral messages you want the Provider Representative to take away from this coaching conversation?

Given these key behavioral messages, what do you most need for the Provider Representative to understand?

N (Next Steps)

What clear, measurable, and attainable Next Steps will you establish to improve or advance your Provider Representative's performance of the tasks/skills Focused on during this coaching conversation?

What are the time frames for the action steps you agreed upon in the coaching conversation? How will you follow up?

EVALUATE - Establish Coaching Continuity

Review co-visit objectives and provide honest and fair feedback. If the coaching conversation occurred on a co-visit, complete the PBCC Co-visiting Report and note tasks that require follow-up coaching. How will you provide additional support that will be helpful to the Provider Representative?

Recorder Checklist: Participative Coaching

Directions: For each role-play, circle the "Yes" or "No" to reflect your observations about the "Manager's" ability to implement the Participative coaching style based on the observations you made during the role-play.

Did the "Manager"…	Did you observe this?	
Seek to understand the Provider Representative's perception of performance?	Yes	No
Set a Participative tone?	Yes	No
Review performance against standards (PBCC Standards, PSI Behaviors)?	Yes	No
Reinforce positive behaviors?	Yes	No
Focus the discussion on one to two tasks/behaviors and opportunities for development on those?	Yes	No
Ask open-ended questions?	Yes	No
Communicate behavioral observations, not judgments?	Yes	No
Ask the Provider Representative for ideas of what to do differently?	Yes	No
Help the Provider Representative to develop an action plan?	Yes	No
Ask the Provider Representative to restate the agreed-upon action plan?	Yes	No
Restate key points of the conversation?	Yes	No
Offer ongoing support?	Yes	No

Role-Play 3 Guidelines

- Work together in groups of three to **PLAN** the coaching conversation using the **Coaching Conversation Worksheet** and **Recorder Checklist**. Conduct the role-play with each person taking the role of:
  - **Manager**: Adopt the appropriate coaching style for the Case Study Representative. Use the **Coaching Conversation Worksheet** to structure your coaching conversation. Try to make your tone and word choices match your coaching style.
  - **Representative**: Adopt the appropriate persona of the Case Study Representative.
  - **Recorder**: Keep notes of the specific words used by the Manager to communicate the appropriate coaching style. Note what you felt worked and what may not have worked.

- Discuss:
  - What was hard; what was easy?

  - What impact was there?

  - What would you do differently next time?

Case Study #3: David

- **Years at PSI:** Four (five previously with another NGO); six years as pharmacist prior to sales
- **Years in role:** Four
- **Past sales performance:** Exceeded objectives; was nominated for Provider Rep of the year award two years in a row
- **Current sales performance:** Well above objectives to date
- **Stakeholder feedback:** Positive comments from peers around sharing best practices in meetings
- **Task to be assessed:** Sharing information
- **Recent observation(s) related to this task:**
  - Demonstrates an excellent understanding of territory and in-depth knowledge of key accounts providers
  - Appropriate use of probing questions in provider interactions
  - Able to convert provider's expression of concerns into an opportunity to extend the dialogue
  - Facilitated a meeting with providers at a very large office; did a superb job of discussing products and services with the entire clinical staff and engaging them all in the conversation
  - Exhibits genuine confidence in PSI products and solutions
- **Business impact of Provider Representative's performance:** Performance with key accounts has translated into opportunities to engage with some previously reluctant providers

Coaching Conversation Worksheet

Use the following questions to help you prepare for and plan your next coaching conversation with your Provider Representative, implement the coaching conversation effectively, and evaluate by documenting your observations in the Co-visiting Report, as appropriate.

PLAN - Prepare to Coach/Assess Readiness

Identify the specific task that you plan to discuss with the Provider Representative and select an appropriate coaching style.

What was the Focus of your previous coaching conversation with the Provider Representative?

Based on your observation of the provider interaction, what is your Provider Representative's task-specific level of readiness? (Can't/Won't, Could, or Can)

Which coaching style will you apply?

- Directive – with those who Can't or Won't
- Participative – with those who Could
- Encouraging – with those who Can

IMPLEMENT - Observe and Provide Feedback

Focus your coaching conversations to positively reinforce effective performance and to facilitate any behavioral changes you expect.

O (Open)

What will you say to establish the appropriate tone and purpose for the coaching conversation?

F (Focus)

Based on your plan and your observations, what specific task performance do you most need to discuss during this coaching conversation? How will you communicate a clear Focus for the coaching conversation?

T (Transition)

How will you Transition to sharing the task-specific behaviors observed? (What did you hear? What did you see? What was the impact on the customer? What results were achieved?)

E (Engage – Directive, Participative, Encouraging)

What questions do you most need to ask the Provider Representative to understand his/her perspective?

What are the key behavioral messages you want the Provider Representative to take away from this coaching conversation?

Given these key behavioral messages, what do you most need for the Provider Representative to understand?

N (Next Steps)

What clear, measurable, and attainable Next Steps will you establish to improve or advance your Provider Representative's performance of the tasks/skills focused on during this coaching conversation?

What are the time frames for the action steps you agreed upon in the coaching conversation? How will you follow up?

EVALUATE - Establish Coaching Continuity

Review co-visit objectives and provide honest and fair feedback. If the coaching conversation occurred on a co-visit, complete the CCI Co-visiting Report and note tasks that require follow-up coaching. How will you provide additional support that will be helpful to the Representative?

Recorder Checklist: Encouraging Coaching

Directions: For each role-play, circle "Yes" or "No" to reflect your observations about the "Manager's" ability to implement the Encouraging coaching style based on the observations you made during the role-play.

Did the "Manager"…	Did you observe this?	
Seek to understand the Provider Representative's perception of performance?	Yes	No
Review performance against standards (PBCC Standards, PSI Behaviors)?	Yes	No
Set an Encouraging tone?	Yes	No
Express appreciation for the Provider Representative's high performance?	Yes	No
Focus the discussion on one to two tasks/behaviors that exemplified high performance?	Yes	No
Ask open-ended questions?	Yes	No
Communicate behavioral observations, not judgments?	Yes	No
Ask the Provider Representative for ideas of how the Supervising Manager can support continued high performance at these tasks?	Yes	No
Empower the Provider Representative to establish an action plan?	Yes	No
Summarize key points of the conversation?	Yes	No
Offer ongoing support and partnership?	Yes	No

Role-Play 4 Guidelines

- Work together in groups of three to **PLAN** the coaching conversation using the **Coaching Conversation Worksheet** and **Recorder Checklist**). Conduct the role-play with each person taking the role of:
  - **Manager**: Adopt the appropriate coaching style for the Case Study Representative. Use the **Coaching Conversation Worksheet** to structure your coaching conversation. Try to make your tone and word choices match your coaching style.
  - **Representative**: Adopt the appropriate persona of the Case Study Representative.
  - **Recorder**: Keep notes of the specific words used by the Manager to communicate the appropriate coaching style. Note what you felt worked and what may not have worked.
- Discuss:
  - What was hard; what was easy?

____

____

____

____

  - What impact was there?

____

____

____

____

  - What would you do differently next time?

____

____

____

____

Case Study #4: Stefan

- **Years at PSI:** Nine
- **Years in role:** Four
- **Past Sales performance:** Below or at objectives
- **Current sales performance:** Below objectives since introduction of new structure
- **Stakeholder feedback:** Sometimes combative with peers in team meetings
- **Task to be assessed:** 4 Pillars: Knowledge, Relevance, Balance, Service
- **Recent observation(s) related to this task:**
    - Lack of planning evident in random presentation of key messages
    - Had not followed up with commitments made in last call
    - Offers a mix of personal stories and data-supported information in each interaction
    - Unable to put product limitations in perspective in a confident way
    - Blames change in territory for downward trends in results
- **Business impact of Provider Representative's performance:** Lack of positive trust development within Provider accounts

Coaching Conversation Worksheet

Use the following questions to help you prepare for and plan your next coaching conversation with your Provider Representative, implement the coaching conversation effectively, and evaluate by documenting your observations in the Co-visiting Report, as appropriate.

PLAN - Prepare to Coach/Assess Readiness

Identify the specific task that you plan to discuss with the Provider Representative and select an appropriate coaching style.

What was the focus of your previous coaching conversation with the Provider Representative?

Based on your observation of the provider interaction, what is your Provider Representative's task-specific level of readiness? (Can't/Won't, Could, or Can)

Which coaching style will you apply?

- Directive – with those who Can't or Won't
- Participative – with those who Could
- Encouraging – with those who Can

IMPLEMENT - Observe and Provide Feedback

Focus your coaching conversations to positively reinforce effective performance and to facilitate any behavioral changes you expect.

O (Open)

What will you say to establish the appropriate tone and purpose for the coaching conversation?

F (Focus)

Based on your plan and your observations, what specific task performance do you most need to discuss during this coaching conversation? How will you communicate a clear Focus for the coaching conversation?

T (Transition)

How will you Transition to sharing the task-specific behaviors observed? (What did you hear? What did you see? What was the impact on the provider? What results were achieved?)

E (Engage – Directive, Participative, Encouraging)

What questions do you most need to ask the Provider Representative to understand his/her perspective?

What are the key behavioral messages you want the Provider Representative to take away from this coaching conversation?

Given these key behavioral messages, what do you most need for the Provider Representative to understand?

N (Next Steps)

What clear, measurable, and attainable Next Steps will you establish to improve or advance your Provider Representative's performance of the tasks/skills Focused on during this coaching conversation?

What are the time frames for the action steps you agreed upon in the coaching conversation? How will you follow up?

EVALUATE - Establish Coaching Continuity

Review co-visit objectives and provide honest and fair feedback. If the coaching conversation occurred on a co-visit, complete the PBCC Co-visiting Report and note tasks that require follow-up coaching. How will you provide additional support that will be helpful to the Provider Representative?

Recorder Checklist: Directive Coaching

Directions: For each role-play, circle "Yes" or "No" to reflect your observations about the "Manager's" ability to implement the Directive coaching style based on the observations you made during the role-play.

Did the "Manager"…	Did you observe this?	
Seek to understand the Provider Representative's perception of performance?	Yes	No
Review performance against standards (PBCC Standards, PSI Behaviors)?	Yes	No
Set a serious tone?	Yes	No
Focus the discussion on one to two tasks/behaviors that require improved performance?	Yes	No
Communicate behavioral observations, not judgments?	Yes	No
Communicate consequences/impact of behavior on Provider Representative or others?	Yes	No
Clarify performance expectations that are not being met?	Yes	No
Provide specific direction for change?	Yes	No
Discuss opportunities for support or training? Model or role-play?	Yes	No
Discuss an action plan.	Yes	No
Ask the Provider Representative to restate the agreed-upon action plan?	Yes	No
Summarize key points of the conversation?	Yes	No
Communicate how Supervising Manager will follow up?	Yes	No

Notes

Common Performance Issues

Root Causes

Notes

Potential Reasons for Lack of Improvement

Common Manager Barriers

Action Planning

The true measure of any training program's value is in how Participants change their behavior on the job as a result of what they have learned. Based on what was discussed in today's workshop, write down at least one thing that you will **do more of**, **stop doing**, or **start doing** as a result of this program:

• Do More Of:

• Stop Doing:

• Start Doing:

Coaching Basics @ PSI

Attendance

Certification

Presented to

First Name, Family Name

Signature

Name , Facilitator

Signature

Name , Facilitator

PSI University training & development

Coaching Fundamentals

Train-The-Trainer

Certification

Presented to

____

Greg Wells, Facilitator

Hilde Jagers, Facilitator

PSI University training & development

Trust and Value Based Negotiation

Certification

Presented to

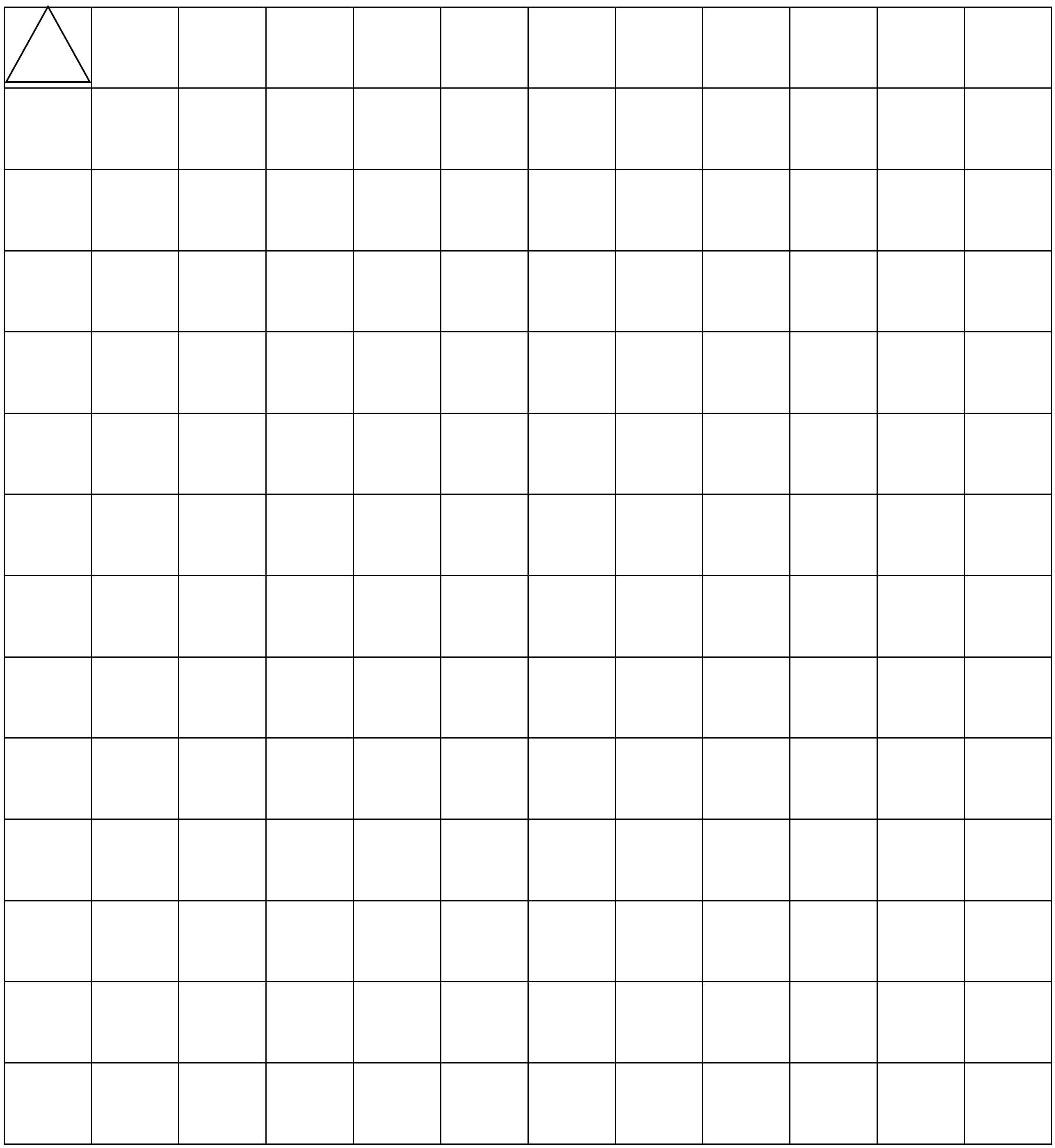
____

xxx, Facilitator

xxx, Facilitator

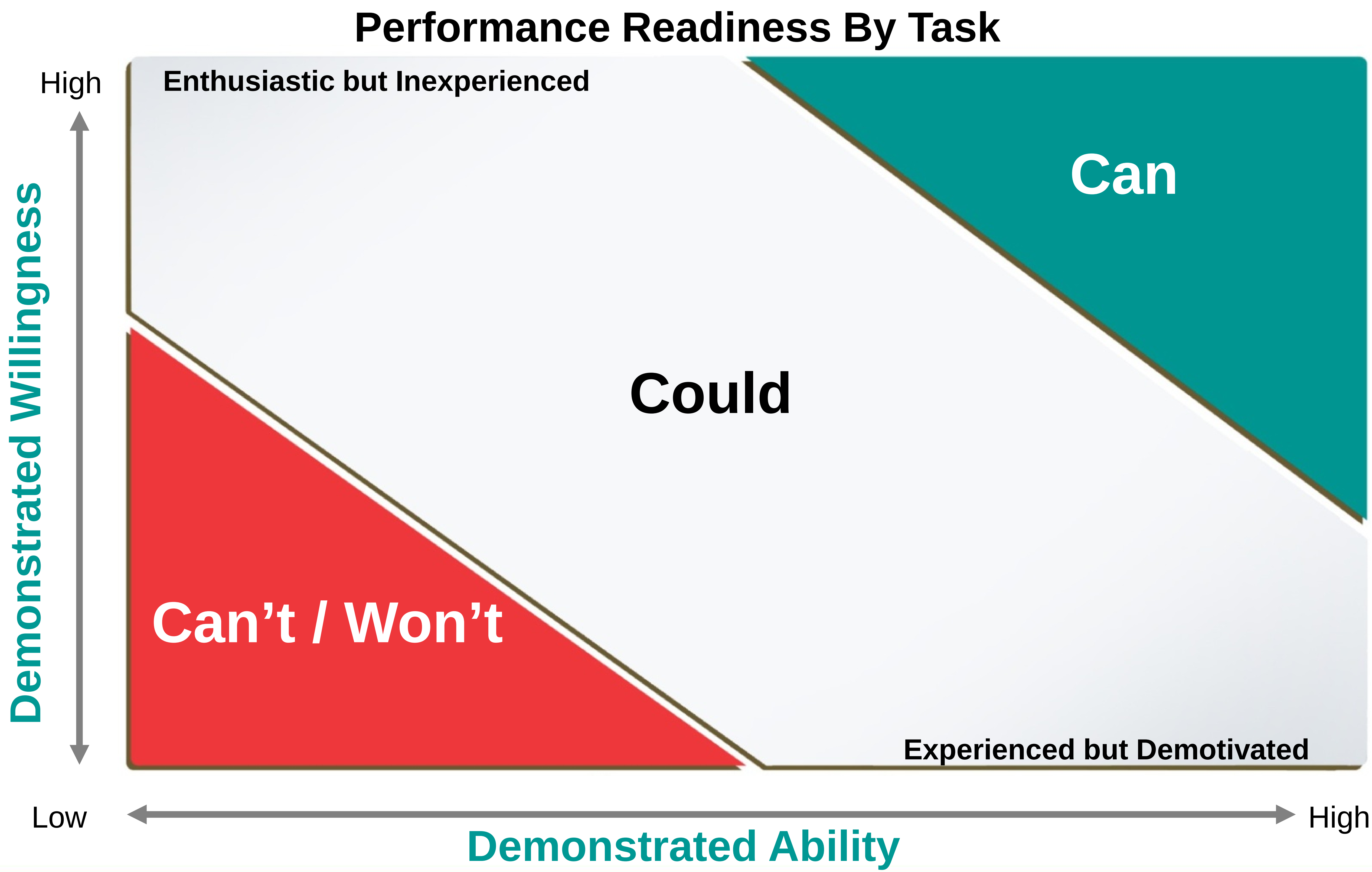
PSI University training & development

Triangle Production Exercise



 Task: Parking Lot Parking	 Task: Street Parking	 Task: Checking Oil
 Task: Highway Driving	 Task: Night Driving	 Task: Driving an Automatic Transmission
 Task: Defensive Driving	 Task: Ice/Snow Driving	 Task: Driving a Manual Transmission
 Task: Changing a Tire	 Task: Driving a Race Car	 Task: Driving a Tractor Trailer

Assesment Place Map



PSI Co-visiting Form

Co-visiting objectives	Achievement Y/N
e.g. PBCC: Adjust message to adoption ladder e.g. PBCC: closing and commit next steps	
collaboration with didi's: how the coach them?	
Territory management: screening new providers	

Observed strengths

Observed areas for development

Follow up activities	Date

Additional comments

PSI Co-visiting Form

Co-visiting objectives	Achievement Y/N

Observed strengths

Observed areas for development

Follow up activities	Date

Additional comments

PSI Co-visiting Form

Co-visiting objectives	Achievement Y/N

Observed strengths

Observed areas for development

Follow up activities	Date

Additional comments

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Co-visiting objectives	Achievement Y/N

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Co-visiting objectives	Achievement Y/N

Observed strengths

Observed areas for development

Follow up activities	Date

Additional comments

PSI Co-visiting Form

Co-visiting objectives	Achievement Y/N

Observed strengths

Observed areas for development

Follow up activities	Date

Additional comments

FIELD COACHING GUIDE

REP: _________________________MGR: ____________________Zone: ______________DATE: ________

RATING SCALE: 4 = Exceeds Expectations 3 = Meets Expectations 2 = Development Opportunity 1 = Below Expectations

A. STRATEGIC PLANNING	RATING	COMMENTS
Respect visit cycle		
Segmentation/Prioritizing providers		
Health Facility Data Sheet		
Provider Strategy Planner		
Weekly Planner		
Avg. Rating (add total & divide by 5)		

RATING SCALE: 4 = Exceeds Expectations 3 = Meets Expectations 2 = Development Opportunity 1 = Below Expectations

B. MD SKILLS	PROVIDER									COMMENTS
	1	2	3	4	5	6	7	8	Avg.	
VISIT OBJECTIVE (SMART, according to needs)										
PREPARATION (visuals, proof sources, gadgets, strategy planner)										
OPENING (relates to objective, gains provider interest, sets theme)										
OPEN QUESTIONS (uncover needs)										
VALUE PROPOSITION Solution / Impact Proof / Cost/Risk										
FEATURES AND BENEFITS SELLING USED										
OVERCOMING OBSTACLES Clarify / Empathize Solution / Confirm										
COMMITMENT/CLOSE										
USE OF VISUALS										
SELF-COACHING POST-VISIT NOTES										
NEXT VISIT OBJECTIVE										
TECHNICAL KNOWLEDGE										
AVG. RATING (1^{st} – Avg. each line under MD skills by dividing sum by total providers rated. 2^{nd} – Sum the total average & divide by 12)										

What do the MDC do well?	What could the MDC improve?

Goal and Objectives

This is a tool to help provide constructive feedback to MDC to maximize their potential, growth and development and monitor progress.

Supervisor will use this form to provide feedback to MDC on strategic planning, territory management and communications skills as observed during field visits. Supervisor and MDC may complete form jointly during field visit. The form may be modified to include other important parameters as deemed necessary and important.

Instructions

Completed during each field visit and used to monitor MDC provider visits, application of skills and provide feedback.

A. STRATEGIC PLANNING
Covers important strategic planning tasks.
Rate MDC on how well they are implementing strategic planning using the rating scale. Insert any constructive feedback, things to work on and things that went well under “comments”.

B. MEDICAL DETAILING SKILLS
Box B covers all the important detailing skills to be executed for each provider visit.
Provider 1 is the first provider visited on the day. There is space for up to 8 provider calls. Use another sheet if there are more visits. You may also choose to record the provider’s name.
For each skill, rate the MDC performance in implementing that skill during the individual provider visit. Use the rating scale provided or another suitable scale. Record constructive comments and feedback on the particular skill under “comments”.

C. DISTRIBUTION OF FORM
One copy to MDC.
One copy in MDC Personnel File
One copy to MIS

RATING SCALE
4. **Exceeds Expectations** – Going above and beyond what is expected. No room for improvement
3. **Meets Expectations** – 90-100%. Meeting expectations and doing job well
2. **Development Opportunity** – 50-89%. Room for improvement. Development in this area is needed through training or practice
1. **Below expectations** – >50% - Repeated coaching and training has been given and no improvement has been made

Field Coaching Guide

(Every medical detailer will receive a supervision visit every month)

Name of Medical Detailer: ______________________________ Name of Supervisor:_________________________________ Date: ______________

District:______________________________ Province:________________________________

Rating scale for each criterion: **(5)**: Excellent; **(4)**: Good; **(3)**: Satisfactory; **(2)**: Below Standard; **(1)**: Unacceptable

Remember!

- A rating of "2" is considered the lowest acceptable standard. However MD should be encouraged to continue to improve their selling skills. **It should be the goal of all MD to achieve a "4".**
- In rating the MD, take into account the response of the provider. Even if the MD shows an understanding of selling skills, they must also elicit a response from the provider. More specifically, the use of selling skill does not guarantee the MD an effective rating.
- Rate each skill equally and individually. MD can demonstrate a high level of performance in one category, but not in another. Base your ratings only on the behaviors that you observe.
- Use the examples listed as a guide, it is not necessary for MD's behavior to be identical to the examples. Use best judgment to rate MD's behavior.
- Your rating should be based on your observations for the entire field-visit with the MD.

Field Work Quality		
A: Medical Detailing Skills: Overall Score: ________ (Total of ratings divided by 9)		
Criterion	**Rating**	**Comments**
1. OBJECTIVE MD has a visit objective for the provider. The objective should be SMART (Specific, Measurable, Attainable, Relevant, Time Bound), according to the needs of the provider and should build on previous visits with provider *eg. During my last visit, Dr. Smith stated he was not inserting IUDs with younger married clients. Today my objective is to find out why Dr. Smith is not currently recommending IUDs to this population and close the visit by asking him to recommend IUDs to this client type with his next 3 patients by next month*	1 2 3 4 5	

2. OPENING Should relate to the objective and set the stage for an open exchange of information. The opening should gain provider interest and set the theme for the visit. Makes a smooth transition from general conversation into opening. *Eg. Spacing births not only helps reduce maternal mortality but helps families care for their children and provide schooling, while saving money for the future.*	1 2 3 4 5	
3. UNCOVER NEEDS USING OPEN QUESTIONS Understands both *what* the provider wants and *why* it is important. Uses clarifying questions to build a full picture of what the provider wants. Listens actively & attentively. *eg. What has been your experience with counseling your clients on the management of side effects with oral contraceptives? [If provider is counseling – thank them and reassure them that they are doing the right thing – If provider is not counseling ask **<u>why not</u>** and record and **<u>consider how to address this barrier</u>**]. Hope your client received good counseling when getting oral contraceptives. While I am here I would also like us to use this sample within a fictitious clinical scenario of a young women who is using OCs for the first time. It should be fun…Is that OK?*	1 2 3 4 5	
4. VALUE PROPOSITION | FEATURE and BENEFITS SELLING Consistently motivates provider behavior change that aligns with PSI objectives by delivering value propositions. **<u>Value Propositions</u>** have four parts: **Offer, Impact, Proof, Cost** **Offering** – What MD offers to the provider and what specific behaviour change is required **Impact** – Description and quantification of the benefit to the provider of making the behaviour change **Proof** – Evidence that substantiates MDs claim of impact **Cost** – Cost or risk to the provider in making the behaviour change *Ex.* ***Need uncovered:*** *Provider doesn't feel confident in her technique in inserting IUDs correctly.* ***Value Proposition:*** *Sister, will you consider attending IUD training with PSI? You'll gain confidence in your abilities under the guidance of an experienced provider. Providers receiving clinical supervision from PSI trained providers have reported improved skills and appreciate the support. Direct supervision minimizes risks of adverse events with insertions so you can reduce worry while building your experience and confidence.*	1 2 3 4 5	

5. OVERCOMING OBSTACLES: Does not get defensive with provider and sees the obstacle as an opportunity to clarify clients motivations to learn more about what he/she needs. MD overcomes obstacles effectively by clarifying, empathising, providing solution, and confirming understanding. Links benefits to the need (the "why"). Builds provider's confidence in relation to provide correct, relevant information and/or promise to find answers back to provider. Provides relevant features/benefits which clear up the misconception. Gains agreement that the benefit has been accepted. *eg. Dr. I just to clarify, your concerned clients will not return after inserting an IUD because it last up to 12 years. I completely understand. Dr. Smith down the street had the same concern when he began offering IUD service. Now, however his satisfied clients have told their friends and family who now come to the clinic for birth spacing methods and other needs. Dr., would you be willing to offer IUDs to more clients to help generate more clients for other services?*	1 2 3 4 5	
6. CLOSING / GAIN COMMITMENT Recognize the appropriate time to close and gains provider commitment to mutually beneficial next steps. Inspires provider's enthusiasm for keeping commitments made. *eg. Dr., thank you very much for your time today. You have been a huge supporter for IUD insertions and have done a great job counseling your clients. Can I ask for you to offer IUDs to the next newly married who comes to you and is looking for birth spacing options? Do you have any other questions for me?*	1 2 3 4 5	
7. LINKING TO OTHER HEALTH AREAS Properly link from one to another health area *eg. Thank you for agreeing to counsel clients on how to manage side effects with oral contraceptives. That same client may also have young children who could benefit from using safe water tablets. Did you know 1 out of 5 children in the area die every year due to unsafe water?*	1 2 3 4 5	
8. USE OF VISUAL AIDS Use presentation skill (using pen to present detailing pieces) with eye contact and follow instruction of using detailing pieces when communicate with providers.	1 2 3 4 5	
9. TECHNICAL KNOWLEDGE Always, be able to handle any questions of provider appropriately & correctly. Use a reference document as needed to convince providers. or promise to find answers and get back to provider. Always, encourage provider to provide counseling to their clients.	1 2 3 4 5	

B: Strategic Planning: **Overall Score:** _______ (Total of ratings divided by 5)		
Criterion	**Rating**	**Comments**
1. RESPECT VISIT CYLE MD has segmented and prioritized providers and uses a visit cycle to plan weekly and monthly schedule. **(5)**:Yes; **(4):** NA; **(3):** NA; **(2):** NA; **(1)**:No	1 2 3 4 5	
2. HEALTH FACILITY DATA SHET Completely fills out one sheet for each and every group practice clinic, single practice provider, pharmacy and other health facility covered by MD. **(5)**:Yes; **(4):** NA; **(3):** NA; **(2):** NA; **(1)**:No	1 2 3 4 5	
3. PROVIDER STRATEGY PLANNER Completely fills out one sheet for top 10-20 providers in a given health service/product area. **(5)**:Yes; **(4):** NA; **(3):** NA; **(2):** NA; **(1)**:No	1 2 3 4 5	
4. FILLS OUT POST VISIT NOTES Is filling out the Provider Visit History and Notes completely in a way that demonstrates they have probed well and clearly know the providers' barriers to behaviour and has a follow-up plan for the next visit. That's the key here. Has the med rep really figured out what he should be talking to the provider about? **(5)**:Yes; **(4):** NA; **(3):** NA; **(2):** NA; **(1)**:No	1 2 3 4 5	
5. FILLS OUT WEEKLY PLANNER & SENDS TO MANAGER WEEKLY **(5)**:Yes; **(4):** NA; **(3):** NA; **(2):** NA; **(1)**:No	1 2 3 4 5	

WHAT DID MD DO WELL?	**WHAT COUD MD IMPROVE?**

Field Work Quality

A: MEDICAL DETAILING SKILLS **RATING: ______________**

B: STRATEGIC PLANNING **RATING: ______________**

(Total of above ratings) **TOTAL**: ______________

OVERALL SCORE: _________________
(Above total divided by 14)

Circle Overall Performance Rating Consistent with Score:

Excellent	Good	Satisfactory	Below Standard	Unacceptable
5.0-4.6	4.59-3.6	3.59-2.6	2.59-1.6	1.59-1.0

Supervisors Signature

____

Medical Detailer's Signature

____

Date: _____________________

Goal and Objectives

This is a tool to help provide constructive feedback to MD to maximize their potential, growth and development and monitor progress.

Supervisor will use this form to provide feedback to MD on strategic planning, territory management and communications skills as observed during field visits. Supervisor and MD may complete form jointly during field visit. The form may be modified to include other important parameters as deemed necessary and important.

Instructions

Completed during each field visit and used to monitor MD provider visits, application of skills and provide feedback.

A. Medical Detailing Skills

Section A covers all the important detailing skills to be executed for each provider visit.
For each skill, rate the MD performance in implementing that skill during the provider visits for the overall day. Use the rating scale provided or another suitable scale. Record constructive comments and feedback on the particular skill under "comments".

B. Strategic Planning

Covers important strategic planning tasks.
Rate MD on how well they are implementing strategic planning using the rating scale. Insert any constructive feedback, things to work on and things that went well under "comments".

C. DISTRIBUTION OF FORM

One copy to MD.
One copy in MD Personnel File
One copy to MIS

RATING SCALE

5. Excellent – Going above and beyond what is expected. No room for improvement
4. Good – 90-100%. Meeting expectations and doing job well. This should be the goal for all MDs
3. Satisfactory – 50-89%. Room for improvement. Development in this area is needed through training or practice
2. Below expectations – >50% - A rating of "2" is considered the lowest acceptable standard. However MD should be encouraged to continue to improve their selling skills.
1. **Unacceptable** - Repeated coaching and training has been given and no improvement has been made

Introducing Coaching to Your Field Team

Sample Presentation

Coaching:

What good looks like, and what it will do for you

Today's Agenda

I. Coaching Objectives

II. Why Coaching Matters

III. What Coaching Is

IV. What We Are Going To Do

V. What You Can Expect

VI. What We Are Asking of You

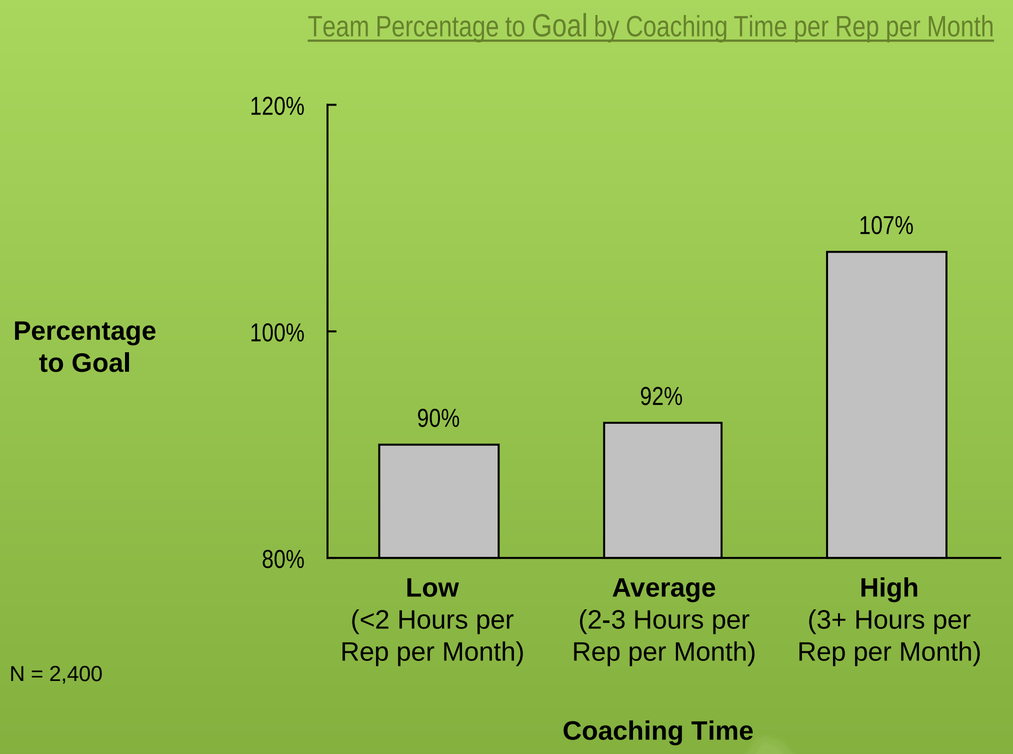
Improving the Impact of Our Coaching Interactions

Objectives:

- Make you more effective at your job
- Help you move the customer faster along prescribing continuum by providing more focused and specific guidance on early-stage (targeting, needs recognition) and closing activities (committments and follow up)
- Improve your skills in key areas necessary for success in role
- Help guide you toward next-level performance
- Share high performer best practices that would help in closing more opportunities
- Increase your engagement with the role and company

Improving the Impact of Our Coaching Interactions

Research indicates that sales individuals who are consistently coached by their managers outperform others by a significant margin



What Coaching Is

Coaching is an **ongoing** and **dynamic** series of **job- embedded** interactions between a **sales manager** and sales rep, designed to **diagnose** and develop/reinforce **behaviors, specific to that individual**.

1 **Ongoing**
Coaches provide frequent and continuous support to direct reports throughout the year.

2 **Embedded**
Coaches observe and evaluate direct reports’ sales behaviors within current roles.

3 **Root Cause-Oriented**
Coaches help direct reports determine the underlying causes of behavior.

4 **Specific**
Coaches tailor their approach to each unique individual on their team.

5 **Behavioral**
Coaches correct, reinforce, or develop behaviors of direct reports and the underlying causes of those behaviors.

Coaching Sessions Allow Managers to Provide Guidance

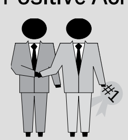
1

Establish Purpose

- Briefly summarize events leading up to session
- Mutually agree on a limited number of specific goals for the session Identify how we will measure progress
- Identify how you will measure progress

2

Reinforce Positive Achievements



- Further understand the areas you feel you have been successful
- Recognize accomplishments, focusing on areas of your improvement since the previous coaching session

3

Dive Deeper into Challenge Areas

- Ask you to self-identify major obstacles to goal at hand
- Help you to identify root causes of performance problems
- Assess proficiency in target skill, behavior, or activity
- Collaborate on ideas for solutions or alternative courses of action

4

Confirm Progress and Plan Next Steps

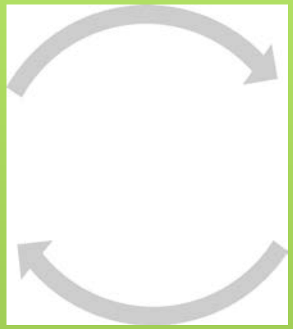
- Outline and document next steps and relevant timelines for you and me
- Schedule next one-on-one coaching session

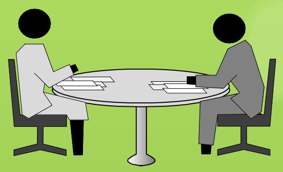
What You Can Expect

You can expect me to…

- Use open-ended questions to identify root causes of performance problems
- Help you accurately assess proficiency in target skill, behavior, or activity
- Ask for your ideas on solutions or alternative courses of action
- Provide honest feedback in a positive tone and share insights on problem-solving approaches

Preparing for Coaching Sessions





<u>Preparation</u>

- Gather and review information on top opportunities. Prepare to discuss details.
- Self-assess performance in recent weeks
- Identify areas where you want coaching or assistance

<u>Agenda</u>

- Follow up on previous coaching discussions
- Review opportunity (customers / skills) background/ updates
- Discuss strengths, reasons why we should win
- Discuss challenging areas and ideas to improve skills or move customers forward
- Agree on next steps and action items

Questions, Concerns, or Feedback?

Field Visit Management

Purpose

To define field visit management, explain why it is valuable, and provide learning resources for conducting effective field visits with Representatives

In this module, you will find:

- What is Field Visit Management?
- The value of Field Visit Management
- The 4 steps of Field Visit Management
- Resources for Field Visit Management

After completing this module, you will be able to:

1. Conduct effective field visits with field representatives

As a Supervisor of PSI field staff representatives, it is suggested that you allocate the majority of your time to being in the field observing their provider interactions and coaching them to enhance provider performance.

BEST PRACTICE:
Field Representative Supervisors should conduct at least one field visit per month per Field Representative. Newer Field Reps or Field Reps needing enhanced performance improvement may require more than one field visit per month.

The Manager of Supervisors should conduct at least one field visit with Supervisors on a quarterly basis. Manager should observe Supervisor and Field Rep working together in Field to assess Supervisor's management and coaching skills, Field Rep skills and operating environment.

What?

Field visit management entails the supervisor working in the field alongside provider representatives while they are interacting with their providers.

How?

Field Visit Management consists of four steps:

1. Plan: Define objectives and strategies to produce best results
2. Schedule: Schedule your time effectively in order to spend the appropriate amount of time in the field with each and every member of your team
3. Conduct: During the visit, observe behavior and give feedback
4. Follow up: Following up after a field visit is critical to sustaining the value gained during the field visit

WIIFM? What's in it for me?

The responsibility for motivating, managing, and developing your team lies with the Supervising Manager. This is a continuous process, and field visits are an important part of that process.

Supervising manager benefits

- The Supervising Manager has the information needed to accurately evaluate every Field Representative's knowledge and skills.
- Minor performance problems can be solved before they become severe.
- The Supervising Manager stays abreast of market conditions, competitors' activities, and the needs of professional Field Representatives.
- Developmental plans can be tailored to meet the specific needs of individual Field Representatives.

Shared benefits

- Supervising Managers achieve supervising objectives when their teams achieve the developmental and business objectives.
- Annual performance reviews are less stressful and more productive because they are based on first-hand knowledge of how Field Representatives are performing. Therefore, surprises and misunderstandings are avoided.

Field Representative benefits

- Field Representatives get the motivational and developmental support they need on a continuous basis.
- Field Representatives see field visits as positive events that help them improve their performance.

Company benefits	• The company can measure the effectiveness of marketing strategies. • Performance development needs are identified.

Resources

To learn more about the 4 Steps of Field Visit Management, complete the self-learning course "A Guide for Supervisors of Provider Representatives." This course consists of 5 Modules:
Module 1: The Value of Field Visit Management

Module 2: Planning for Field Visits

Module 3: Scheduling Field Visits

Module 4: Conducting Field Visits

Module 5: Following Up after Field Visits

Example

Example of coaching on a field visit:

- Prior to your field visit, review past field coachng reports to reorient yourself to the developmental needs of your employee. Review other relevant documents such as provider quality assessments and clinic volume.
- Discuss with the Representative the objective of the call prior to entering the clinic. Ensure they have a plan for that call.
- Observe the provider interaction. Was the provider accurately profiled? Did the representative engage in a dialogue with the provider? Were barriers to change addressed, (i.e., knowledge, opportunity, ability, motivation)? Was there a commitment or were next steps achieved with the provider?
- Take time to debrief with the representative immediately following the call. Avoid the temptation to quickly move onto to the next call.
- Ask the representative for their view, "What went well? Did you achieve your objective? What would you change?"
- Keep in mind that feedback is based on observable behaviors, (i.e., words/actions, what you see, what you hear, evidence). Conversely, judgments are subjective, have personal bias,

prejudices, reactions and assumptions. Always anchor your feedback in observable behaviors.

- Provide your observations, and if required, actually model them for the representative. Collectively explore additional ideas, and commit to action. Consider leveraging another member of your team who may excel in a certain area with which your representative is struggling.
- At the end of the day, debrief on the entire day. Agree with the representative on 1-2 specific areas for improvement regarding their ability to positively impact provider behavior change. Complete the Field Coaching Guide with the representative, and send a copy within the next 1-3 business days.

Self-Learning Questions:

- What is Field Visit Management? According to Best Practice, how often should a manager or supervisor conduct a field visit with each Representative?

- What are the four steps involved in Field Visit Management?

- What is the value of conducting field visits?
    - Value for the Supervisor?

    - Value for the Representative?

<u>Action Items:</u>

Within one month of completing this module, complete the following activities:

1. Complete the Field Visit Management Self-paced course "A Guide for Supervisors of Provider Representatives" (5 modules).
2. Supervisors: Plan and schedule field visits with your Representatives.

Due Date: Enter the date one month from today here and mark your calendar.

PREVIEW

Field Visit Management: A Guide for Supervisors of Provider Representatives

Module 1: The Value of Field Visit Management

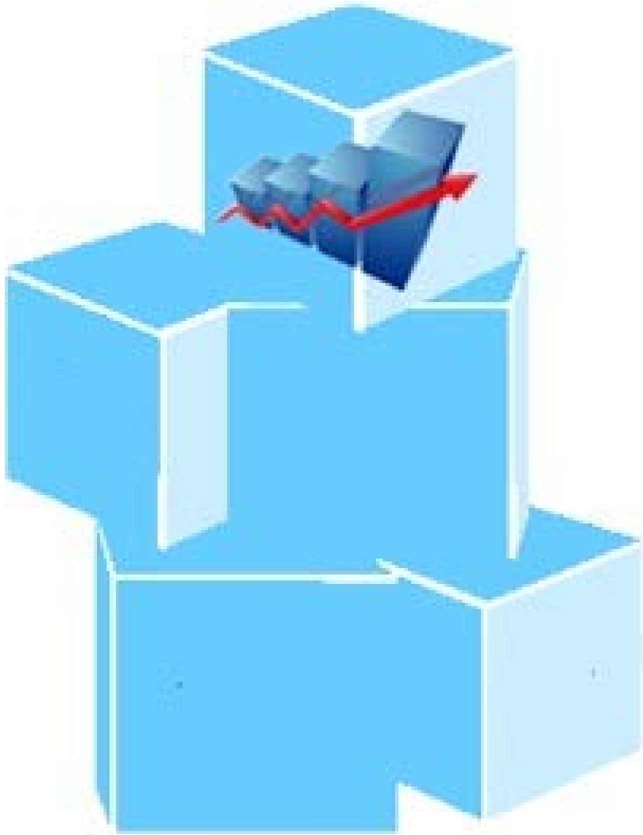
What is in it for you as a Supervisor?
for your Provider Representatives?
for your Country Platform?

Module 2: How to **Plan** for spending a day in the Field with your Provider Representative

Module 3: How to **Schedule** your time so you spend the appropriate time with each and every member of your team

Module 4: How to **conduct** a Field Visit Day?

Module 5: How to do the **Follow Up** after a Field Visit Day?



MODULE 1

The Value of Field Visit Management by Supervisors

MODULE 1

What is field visit management?

Field visit management is you as a supervisor, working in the field with your Field Representative while they are interacting with their providers.

It consists of :

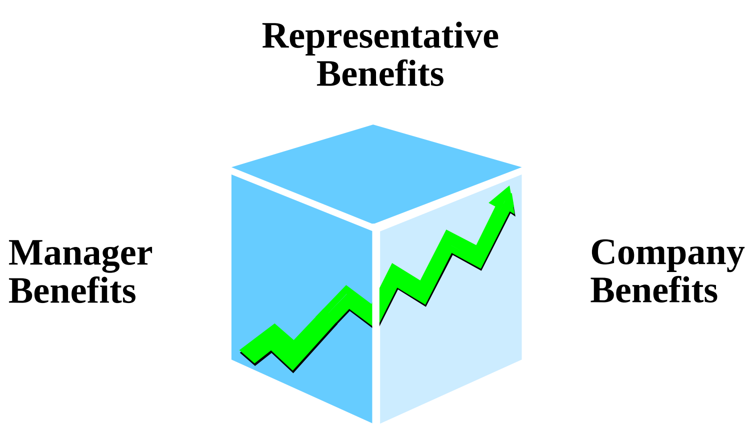
- Planning (see Module 2): define objectives and strategies to produce best results
- Schedule (see Module 3): Helps you schedule your time to have visits with all
- Conduct (see Module 4): Gives guidance to observe behavior and give feedback
- Follow up (see Module 5): is critical to sustain the gain of the field visit

Learning Objective

This module leads you to examine your assumptions about field visits and their value to you, to your team, and to the company.

When you have completed this module, you will be able to explain the value of field visits from three points of view:

- Supervisor
- Field Representative (also called medical detailer)
- PSI or local Platform



Information

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The Supervisor's Role

The Supervisor's role is directing the team to achieve PSI objectives. This course focuses on the care and development of Field Representatives; success in this area in turn affects success in all the others.

Personnel

People are your most valued asset. The Supervisor might develop and support this asset in a number of ways.

- *Recruiting and selecting* new Field Representatives.
- *Training* Field Representatives to assure ongoing development and performance improvement.
- *Developing the full potential of Field Representatives* through continuous joined development of objectives, performance evaluation, coaching or counseling and further opportunities. Evaluation of progress is based on established standards and documented by field visit reports and performance appraisals. (see supervision support toolkit)
- *Recommending individual recognition, merit increases and promotions* as a means of motivating and grooming Field Representatives for advancement in the company.

Communication

Effective Supervisors maintain a system of communication between the field and the office.

Organization

The Supervisor is responsible for recommending changes in personnel assignments, territory configurations, and deployment of Field Representatives as necessary to achieve maximum marketing effectiveness in the Supervising.

MODULE 1

Product/Service knowledge	Supervisors must maintain their own product and service knowledge and make sure that all Field Representatives are fully versed in all aspects of product, service and disease knowledge.
Control	Supervisors must develop and use necessary controls to assure that personal, management, and objectives are being met.
Professional & trade relations	Supervisors develop and maintain key contacts with other health professionals (e.g. organizations, pharmacists, distributors, hospital administrators, etc.) to maintain a positive image and collect local market information.
Market	Supervisors analyze market characteristics in their Supervising to establish and implement strategic plans for penetrating the local market.
Sales objectives	Supervisors are responsible for leading their Field Representatives to achieve the sales objectives established for their territories.

Benefits of Field Visits

The responsibility for motivating, managing, and developing your team lies with you as the Supervisor. This is a continuous process, and field visits are an important part of that process.

Supervisor benefits

- The Supervisor has the information needed to accurately evaluate every Field Representative’s knowledge and skills.
- Minor performance problems can be solved before they become severe.
- The Supervisor stays in touch with market conditions, competitors' activities, and the needs of professional Field Representatives.
- Developmental plans can be tailored to meet the specific needs of individual Field Representatives.
- Supervisors achieve Supervising objectives through their team achieving the developmental and business objectives.

Shared benefits

- Annual performance reviews are less stressful and more productive because they are based on first-hand knowledge of how Field Representatives are performing. Therefore, surprises and misunderstandings are avoided.

Field Representative benefits

- Field Representatives get the motivational and developmental support they need on a continuing basis.
- Field Representatives see field visits as positive events that help them improve their performance.

Company benefits

- The company can measure the effectiveness of marketing strategies.
- Performance development needs are identified.

Performance Self-Check

1. In the space provided below and on the next page, collect your own thoughts about the benefits of field visits from all points of view: the Supervisor's, the company's, and the Field Representative's. For each point of view an example benefit is provided to get you started.

2. Your lists should state benefits supporting job descriptions, goals and objectives for each point of view.

The Supervisor's point of view

From the manager's point of view, field visits provide opportunities to:

Example: Develop ideas to share with other professional Field Representatives.

Your Ideas

- ____
- ____
- ____
- ____
- ____

The company's point of view

From the company's point of view, field visits provide opportunities to:

Example: Reinforce positive performance and raise overall performance through coaching.

Your Ideas

- ______________________________
- ______________________________
- ______________________________
- ______________________________
- ______________________________

The Field Representative's point of view

From the Field Representative's point of view, field visits provide opportunities to:

Example: Review events with a manager who understands the market environment.

Your Ideas

- ______________________________
- ______________________________
- ______________________________
- ______________________________
- ______________________________

When you feel your lists are complete, compare them with the feedback beginning on page 17.

Feedback

Your lists may look something like the ones below, although you may have included additional points not included here.

Remember, a correctly stated benefit must support accomplishing job descriptions and objectives.

The Supervisor's point of view

From the manager's point of view, field visits provide opportunities to:

- Develop ideas to share with other professional Field Representatives.
- Observe skills firsthand.
- Reinforce positive behavior.
- Correct negative behavior.
- Directly assess performance of each Field Representative.
- Check understanding of product and service knowledge.
- Gain complete picture of how Field Representatives are doing and what challenges they face.
- Gather data for reports.
- Build close working relationships with their team.

The company's point of view

From the company's point of view, field visits provide opportunities to:

- Reinforce positive performance and raise overall performance through coaching.
- Respond to the needs of field.
- Identify overall training needs.
- Assess effectiveness of company plans and strategies.
- Gain insights into market trends and characteristics.

The Field Representative's point of view

From the Field Representative's point of view, field visits provide opportunities to:

- Gain a manager's perspective on the market environment.
- Discuss specific sales challenges to generate options and ideas.
- Obtain feedback on their performance from someone who can act as an extra set of eyes and ears to know exactly what happened during a sales call.
- Receive coaching or counseling for skills that need development and reinforcement.
- Feel a part of a supportive team, where progress toward desired performance is encouraged.

Continued…

The Field Representative's point of view, continued

- Check progress toward annual performance improvement goals.
- Hear from a reliable source how strategic plans are progressing in other territories and Supervising.
- Share concerns, disappointments, frustrations with someone who cares and understands.
- Hear new and useful information about products, services and competitors.
- Build trust and personal rapport with the Supervisor.

Performance Discussion

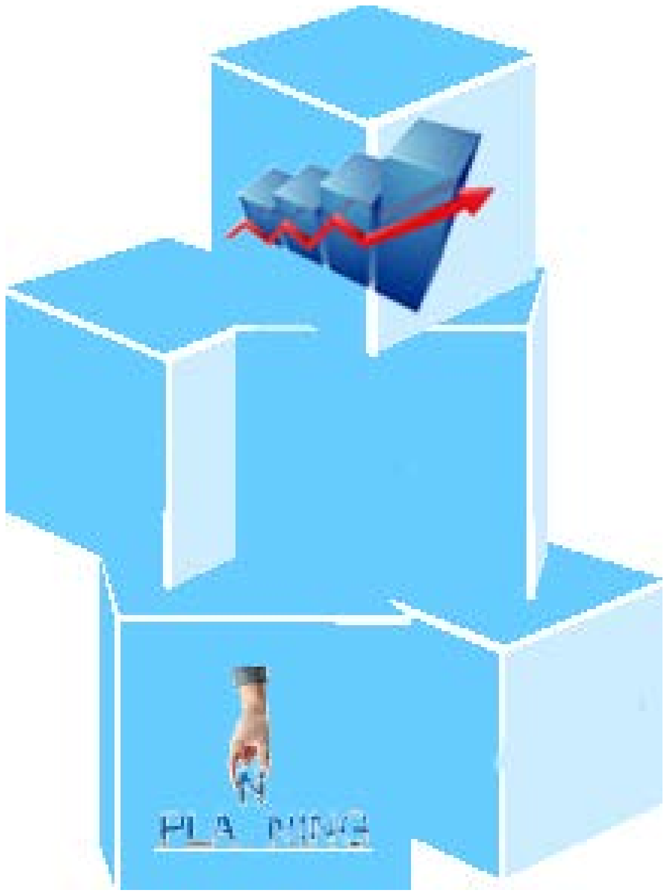
After you have compared your lists, discuss them with your colleague.

Action Checklist

Using the checklist below as a guide, consider how you might implement ideas you have generated and discussed with your colleagues.

Consider . . .

- ☐ What changes in my and the Field Representatives' point of view need to be made?
- ☐ Do I need to gather more information about job descriptions, goals and objectives?
- ☐ Do I need to identify more benefits?



Module 2

Planning

Introduction

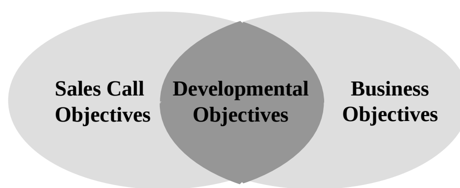
Field visits are more likely to produce positive results when they are thoughtfully planned. This means carefully thinking through objectives for the visit and how these objectives will be accomplished.

During field visits you will be concerned with three types of objectives:

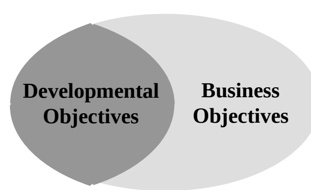
1. *Development objectives* aimed at improving or reinforcing the Field Representative's performance. These are shared responsibilities.

2. *Business objectives* supporting results for the company. These are the responsibility of the Supervisor.

3. *Visit objectives* for each provider visit and each product discussed. These are the Field Representative's responsibility.



This module emphasizes development and business objectives.



Learning Objective

Although the thinking that goes into planning a field visit should be thorough, the overall process should be kept simple. Some documentation will be needed, but this should be kept to a minimum.

The ideas here are offered as enhancements to consider in the planning process you already use.

When you have completed this module, you will be able to work with your Field Representatives to:

- Establish meaningful development and business objectives for field visits.
- Plan field visits so that objectives are met.

Overview of the Process

The process of planning field visits includes several components.

- Consider the development and business reasons for field visits and the information you may need to gather.
- Effectively involve Field Representatives in the planning process.
- Apply well-defined criteria in determining development objectives. (see coaching course)
- Develop your own plans for field visits.
- Keep the number of development and business objectives to a maximum of two each.

Planning

- Define business and development needs
- Collect information
- Develop business and development objectives
- Plan field visit

→ **Scheduling** → **Conducting** → **Follow-up**

Information

Reasons for Field Visits

The overriding reason for making field visits is to fulfill your role as a developer of Field Representatives—to observe firsthand how Field Representatives are doing and to coach them in achieving their full potential.

Example reasons for scheduling field visits:

Development

- Staying informed about a Field Representative's performance
- Helping newly hired Field Representatives in their initial orientation and development
- Investigating a performance problem
- Supporting a Field Representative who has asked for your help

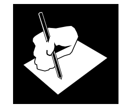
Business

- Learning about a new territory or changes in the market
- Evaluating a promotional strategy
- Recruiting speakers for special events

Development & Business

- Following up on action plans discussed during a Field Representative's annual performance appraisal or previous field visits

For all situations you will need to define specific development objectives. And to do that, you will need to involve the Field Representative and gather specific information.



Practice

Sources of Information

In the previous module we discussed why you work in the field with your team. Next we must consider what you need to know about the Field Representative and the territory, and where to get that information. For each of the situations described below, consider where you would look for information to help you plan development and business objectives for the field visit. A first idea has been provided for you in each case. Add your ideas in the space provided.

Reason for Field Visits—Development	***Sources of Information***
1. Staying informed about a Field Representative's performance	*Example*: Last field visit report *Your Ideas:*
2. Helping newly hired Field Representatives in their initial development	*Example*: Files left by previous Field Representative *Your Ideas:*
3. Investigating a performance problem	*Example*: Previous performance appraisals *Your Ideas:*
4. Supporting a Field Representative who has asked for your help	*Example*: Discussion with the Field Representative *Your Ideas:*

Reason for Field Visits—Business	***Sources of Information***
5. Learning about a new territory or changes in the market	*Example*: Previous manager's or Field Representative's records and documents *Your Ideas:*
6. Evaluating a promotional strategy	*Example*: Promotional Plan *Your Ideas:*
7. Recruiting speakers for special events	*Example:* The prospective speaker's curriculum vitae *Your Ideas:*
8. Following up on action plans discussed during a Field Representative's annual performance appraisal	*Example:* Notes made during performance appraisal discussion *Your Ideas:*

Compare your list with examples on the next page.

Feedback

Reason for Field Visits—Development	***Sources of Information***
1. Staying informed about a Field Representative's performance	• Last field visit report • Review of current performance against plan • Current issues • Marketing requirements
2. Helping newly hired Field Representatives in their initial development	• Files left by previous Field Representative • Goals and needs stated by Field Representative • Input from training department
3. Investigating a performance problem or to assist a Field Representative in solving it	• Previous performance appraisals • Analysis of specific behavior • Development needs previously identified and addressed
4. Supporting a Field Representative who has asked for your help	• Discussion with the Field Representative • Last performance appraisal • Records of achievement • Field Visit Reports and notes from previous field visits

Feedback, continued

Reason for Field Visits—Business	***Sources of Information***
5. Learning about a new territory or changes in the market	• Previous manager's or Field Representative's records and documents • Input from Field Representatives • Business contacts such as doctors, pharmacists, or others
6. Evaluating a promotional strategy	• Promotional strategy plan • Promotional literature • Correspondence from Marketing • Field Representatives' feedback • Providers' reactions
7. Recruiting speakers for special events	• Curriculum vitae • Hospital organization charts • Medical publications • Medical interest groups
8. Following up on action plans discussed during a Field Representative's annual performance appraisal	• Notes made during performance appraisal discussion • Performance development goals set by the Field Representative • Marketing strategies • Employee Development Plan (see toolkit) • Business or project objectives

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Information

Criteria for Determining Development Objectives

Having considered reasons, examined information and involved the Field Representative, you are ready to define development objectives for the field visit. Well-stated field visit development objectives should meet four criteria.

1. *Relevant*

Development objectives must be meaningful to Field Representatives. They must believe that accomplishing these objectives is in their own best interest and a way of moving toward achieving professional and personal goals.

2. *Specific*

Development objectives should be phrased in clear terms. They should focus on performance behaviors—what is *said* and *done*!

3. *Manageable yet challenging*

Development objectives should be attainable and within the control of the Field Representative. They should be realistic, but challenge the Field Representative's skill level and application.

4. *Priority order*

Development objectives should not be a list of points taken from the annual performance appraisal. Concentrate on just one or two important objectives. Move on to others only when these have been accomplished.

Typical Development Objectives

Here are some examples of development objectives that meet the four criteria.

Example 1

"Our objectives are to review your progress on each topic discussed during the quarterly review and to observe your application of core messages to check that it fits provider-identified needs."

Example 2

"As part of your plan to increase results, you identified a need to establish a specific call objective for each PBC discussion and note results on the provider's card. The call objective will state what you want the provider to agree to do. Your notes should include indicators of progress and call objectives for subsequent visits."

Example 3

"Two objectives for this field visit are to assess your progress with the (xyz) program for in (provider or hospital) and to observe your use of supportive materials for (abc) products or services."

Example 4

"You're working to increase the call frequency rate to at least XX per day. We'll review your new planning system and your progress in applying it."

Example 5

"Our objectives for this trip are to check on the status of [Product] at your provider/ hospitals and analyze your second quarter performance in relation to your annual statement of objectives."

Practice

1. Choose two of your supervising's Field Representatives.
2. Use the two worksheets here to record your field visit plans for each.
3. After you have completed the two worksheets, discuss your work with a colleague.

Field Representative 1	
1. Reason for field visit	
2. Sources of information to review	
3. Potential benefits of a field visit for the: Field Representative Company You, the Supervisor	
4. Possible development objectives reflecting the 4 criteria	

Field Representative 2	
1. Reason for field visit	
2. Source of information to review	
3. Potential benefits of a field visit for the: Field Representative Company You, the Supervisor	
4. Possible development objectives reflecting the 4 criteria	

Information

Joint Planning for Field Visits

When you arrive for a field visit with little notice or preparation, Field Representatives are likely to think that you have come to spy on them and find faults. The purpose of field visits is not to police events but to support and reinforce good performance. Joint planning between you and the Field Representative helps reinforce this message.

Practice

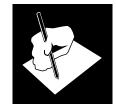
Below is a partial list of preparation steps you may need to complete before a field visit. Review the list and add your own ideas to it using the worksheet on the next page. Then share your ideas with a colleague.

What you need to do

- Prepare your field visit development and business objectives.
- Call about one week before the visit and ask for the Field Representative's development objectives.
- Explain your field visit development and business objectives.
- Ask if there is anything you can bring or do on the field visit to help the Field Representative.
- Ask if there are likely to be foreseeable problems with achieving what is wanted from the visit—for example, provider canceling appointment.
- Review development and business objectives the night before the field visit.

What you need to do

Practice



Field Representatives should prepare for a field visit as well. Below is a partial list of preparation steps you should ask Field Representatives to complete before a field visit. Review the list and add your own ideas below. Then share your ideas with your colleagues.

What the Field Representative needs to do

- Review most recent sales and call data.
- Plan a normal day allowing time for coaching after each call when possible.
- Review last field visit report.
- Define development objectives.
- Review Supervisor's development and business objectives.
- Plan for any special activities.

What the Field Representative needs to do

Practice

Below is a brief profile of a Field Representative. Prepare development objectives for the next field visit with this person.

Field Representative profile

- Worked the same territory for 4 years.
- Has good service and product knowledge.
- Sales results are flat, all products not growing.
- Presents same promotional message to all Providers, without taking into account the adoption continuum
- Providers never ask questions.

Field visit development objectives

Colleague review

Review your objectives with a colleague using the criteria on the next page.

Colleague Review Checklist

- ☐ Can all of the development objectives be accomplished on a single field visit?
- ☐ Are development objectives prioritized?
- ☐ Are the development objectives relevant to the Field Representative’s profile?
- ☐ Do the development objectives address the problems contained in the profile?
  - Sales plateau
  - Provider's lack of involvement
  - Field Representative's motivation after 4 years in the territory
  - PBCCommunication skills

    (Why is the Field Representative using the same message?

    What questions are asked to the providers?)

Example

The Field Visit Plans presented below and on the next page illustrate how objectives and plans can be concisely summarized on one page.

Example Field Visit Plan 1: (***Before involving the Field Representative)***

Field Representative *Charles Lewis*	**Work Date** *9 Feb 13*
Supervisor Objectives 1. *Ensure questioning and listening skills meet performance standards.* 2. *Reinforce benefits of giving provider informed choice.*	
Supervisor Preparations 1. *Review field visit reports for last 4 visits—look for improvement in using informed choice approach.* 2. *Analyze call frequency data for target providers for last 6 months.*	
Field Representative Objectives	
Field Representative Preparations	

Example Field Visit Plan 2: (***After joint planning with the Field Representative)***

Field Representative *James Brown*	**Work Date** *28 Mar 13*

Supervisor Objectives

Observe:

1. *Use of reprint for [Product] meets the performance standards.*
2. *Opening call is linked to patient profile of discussion.*

Supervisor Preparations

1. *Review performance standards from "Provider Behavior Change COMMUNICATION" course.*
2. *Review performance standards regarding openings from " Provider Behavior Change COMMUNICATION " course.*

Field Representative Objectives

1. *Demonstrate use of benefits and informed choice perspective in all product discussions.*

Field Representative Preparations

1. *Select appropriate reprints.*
2. *Plan discussions based on previous call notes in progress planner.*
3. *Prepare a role play for practice in the morning before calling on providers.*

Performance Self-Check

Use the two blank "Field Visit Plan" forms on the next two pages to prepare field visit plans for two of your Field Representatives. Complete only the areas for Supervisor Objectives and Preparations.

Performance Discussion

After completing both forms, discuss with a colleague your thinking behind objectives and preparation steps. Make refinements as needed.

Field Visit Plan

Field Representative	Work Date
Supervisor's Objectives	
Supervisor's Preparations	
Field Representative Objectives	
Field Representative Preparations	

Field Visit Plan

Field Representative	Work Date
Supervisor's Objectives	
Supervisor's Preparations	
Field Representative Objectives	
Field Representative Preparations	

Action Checklist

Consider how you will implement the concepts presented in this module.

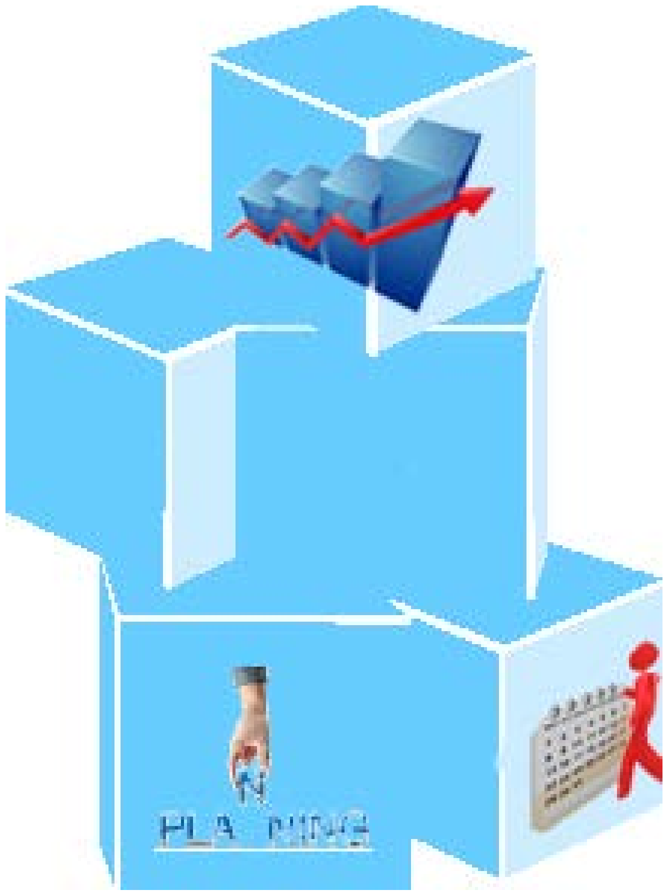
- ☐ What changes need be made in the way I plan for field visits?
- ☐ Do I need to gather more information?
- ☐ Do I need to identify more sources of information?
- ☐ How well do I use communication channels to gain Field Representatives' involvement in planning for field visits?
- ☐ Can I make better use of memos, either on paper or e-mail, to involve Field Representatives in planning for field visits?
- ☐ How will I inform Field Representatives of my development and business objectives?
- ☐ How will I keep my manager informed of field visit planning?

Performance Aids

On the following page is a checklist you can use when planning field visits.

Planning the visit

- ☐ Establish what business issues need to be addressed during a field visit.
- ☐ Establish what knowledge or skills are to be observed.
- ☐ Plan all field visits with Field Representatives.
- ☐ Jointly write the development objectives for each visit, remembering to give the Field Representative's development objectives the highest priority. Reinforce Field Representatives when their objectives match yours.
- ☐ Review development and business objectives before the visit.
- ☐ Ensure the Field Representative understands the intention of the visit, the place and the time.
- ☐ Collect all information and supporting materials required for the visit—e.g., company documents, sales results, planning documents.



Module 3

Scheduling

Introduction

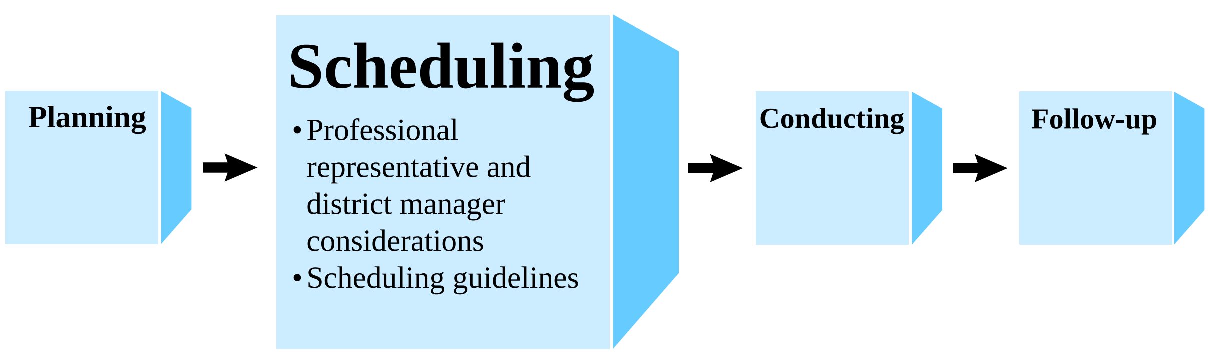
Scheduling your time to allow for frequent field visits is likely to be a major challenge. There are meetings to attend, reports to write, budgets to prepare.

The focus of this module is on the scheduling of your field visits so they fit within the actual time you have available. It presents criteria to be considered when distributing your field visit time across all your Field Representatives.

Learning Objective

When you have completed this module, you will be able to:

- Analyze field visit frequency needs of your team to ensure that *all* receive their fair share of your time.
- Recognize and avoid common mistakes supervisors make in distributing field visit time.
- Complete a year's schedule for visits with all your Field Representatives to support their development.



Information

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Field Visit Distribution Management

Your field visit schedule should be aligned with the % in field described in your objectives and should be a *balanced distribution of your time throughout the year*.

Every country has standards (= how good looks like) for scheduling field visits. In addition, you should have personal standards to ensure optimal support for all your Field Representatives. This may demand more field visits with some Field Representatives than your country standards expect. That means scheduling your time in such a way that you see *all* your Field Representatives, not focusing on only a few.
When scheduling your field visits consider these questions for a productive and fair time distribution:

- Are you spending too much time with the good performers?
- Do you spend too much time with people who have performance problems?
- Do you tend to spend too much time with Field Representatives who work in the same region as you live?
- Could any of your Field Representatives claim you are never around?
- Are you seeing each Field Representative in a variety of situations?
- Do you have a personal bias that leads you to spend more time than necessary with some people and not enough time with others?
- Are you spending enough time with newly hired Field Representatives?

Guidelines for Scheduling

This list of guidelines is a thinking process for scheduling field visits. This list reflects the best practices exhibited by many supervision managers.

- Your management requires you to visit each Field Representative at least once per month, or maybe a certain number per quarter or per year.
- Your personal requirement is to not let xx weeks go by without seeing an individual representative.
- Assess each representative's experience and performance to determine their need for support, especially for coaching.
- Based on the assessment, determine how many days per month or per quarter each representative 'deserves'.
- Add the days for all your team.
- Prioritize the representatives based on their experience and performance profiles.
- You'll have the biggest gain with your middle performers and should spend most of your coaching time with them. But never forget to spend time with high performers (to keep them motivated and to share best practice) and your less performers (to manage them up or out)
- Determine the number of days you have available.
- Considering individual needs, priorities, their locations in the district and your availability, you are now ready to create a schedule for field visits.

Proceed to the practice on the next page to apply these guidelines.

Practice

Practice 1

The chart on the next page illustrates field visits made by a Supervisor with four of the seven in total, Field Representatives during one year. Below are brief profiles of the four Field Representatives included on the chart.

Representative 1

Having recently joined the team from another company, she has good experience and seems to work well on her own. Her field assignment began in March, in a territory near by.

Representative 2

A senior Field Representative, this person has been with the company many years. In fact, he trained his last manager some ten years ago. His performance, though never outstanding, gives no reason for concern. He lives the farthest away.

Representative 3

This is an extremely ambitious Field Representative who is seeking promotion. He values contact with his Supervisor, but tends to take constructive feedback defensively. Besides investing a lot of time and effort in the job, he seeks opportunities to claim credit whenever possible. This Field Representative lives almost as far away as Representative 2.

Representative 4

This person, who lives very near by, is constantly calling for help and advice, and so seems to take up a lot of the manager's time. The Field Representative's results are not satisfactory in a territory with strong growth trends for competitive products and services.

Practice 1, Field Visit Plan

In this practice example, the country standard is to work with each Field Representative at least once every two months. The Supervisor's personal goal is to work with each Field Representative once every five weeks.

What are your observations about how this Supervisor distributed field visit time? Note your observations in the space provided.

Reps	Months											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1			X	X	X							
2						X	X					X
3	X	X		X		X	X			X	X	X
4	X	X	X	X	X		X		X	X	X	
5												
6												
7												

Observations

Feedback, Practice 1

When we look at the distribution of field visits for these four Field Representatives, we can see some of the unintentional reasoning that may have been applied. Compare your reactions with this additional information.

Representative 1

The Supervisor saw her each of the first three months when she joined the company. Since then, as a result of her general competence and desire to work alone, it has been tempting to concentrate on what seem like other priorities. The Supervisor has not followed either the country or his personal standards. The Supervisor is out of touch with this Field Representative.

Representative 2

This experienced Field Representative has seen it all and has settled into a well-established niche. Although the Field Representative frequently meets his targets, the Supervisor has tried to increase motivation because it is felt he could improve. The Field Representative, however, seems not to respond. The Supervisor feels frustrated by this. There are no real problems, and as he lives the farthest distance away, it is easy to attend to more urgent matters. The Supervisor has not followed either the country or his personal standards for frequency of field visits.

Representative 3

Because this Field Representative values field visits, makes requests for them, organizes the day well, and fits in with the manager's schedule, he has a high frequency of visits. The Supervisor has found these easy and rewarding days, and so has spent extra time with this Field Representative. He has over-scheduled time with this person.

Representative 4

This Field Representative is constantly requesting assistance and guidance. Because it is so convenient, the Supervisor gives a disproportionate amount of time. Other Field Representatives may well think, *“To get support from our manager I need to be ambitious, a nuisance, or live nearby.”*

Practice 2

A Supervisor with a group of seven Field Representatives put together a plan to distribute field

	visit time. Here is some background information on each Field Representative.
Representative 1:	An average performer who lives close by.
Representative 2:	Another average performer. Making a field visit to work with this person requires overnight travel.
Representative 3:	A slightly above average Field Representative who lives farthest away.
Representative 4:	A new Field Representative who joined the district in January and lives only minutes away.
Representative 5:	A senior Field Representative, above average in all respects, who lives far enough away to require an overnight stay.
Representative 6:	A Field Representative with several years' experience, with performance is below average and who lives in the same town as the Supervisor.
Representative 7:	A Field Representative whose performance is always just below targets and who is not a particularly pleasant person to be with. Working with this person requires over an hour of travel each way.
Standards:	The company standards are to work with each Field Representative at least eight times per year. This manager's personal standard is to be with all representatives at least every six weeks.
Other Factors:	The Supervisor had several meetings in February that limited field visits. Also, meetings and interviewing prevented the manager from working with all Field Representatives every month.
Instructions, Part 1	Review the Supervisor's field visits from January through May and note below your observations for each of the Field Representatives compared to the guidelines.

Practice 2, continued

Reps	Months				
	Jan	Feb	Mar	Apr	May
1	X		X	X	X
2	X		X		X
3	X				
4	X	X	X	X	X
5	X			X	
6	X	X	X	X	X
7	X				X

Observations

Practice 2, continued

Feedback, Part 1

You may have noted in the January through May time period:

- The Supervisor tended to spend too much time with Field Representatives 1, 4 and 6. All of them live near by.
- Time allocated for Field Representative 2 seems right, considering the company's and the Supervisor's personal standards.
- Representative 3 deserves more frequent reinforcement and coaching, despite the travel distance.
- By only visiting with Representative 5 two times, opportunities were missed for learning about highly effective practices and for reinforcing them.
- The reason to see Representative 6 each month is to observe behavior and determine his willingness and ability to improve.
- Representative 7 needed more time with the manager, yet got the second least attention.

Practice 2,continued

Instructions, Part 2

Complete the field visit schedule for the remainder of the year as if you were the district manager.

When you are finished, discuss your completed schedule with a colleague.

Reps	Months											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1	X		X	X	X							
2	X		X		X							
3	X											
4	X	X	X	X	X							
5	X			X								
6	X	X	X	X	X							
7	X				X							

Practice 2, continued

Feedback, Part 2

On the next page is an example of a field visit schedule for the remainder of the year.

Representative	Comments
1	Spread apart visits to allow more time for others.
2	Continue the previous normal pattern.
3	This representative has a good probability for significant performance improvement through coaching.
4	Now that this person is progressing well, it is time to shift to a normal pattern.
5	More frequent field visits with this representative provide an opportunity to learn about and reinforce effective practices, and to make those practices available to other representatives in the district.
6	Continued observation is required for assessment of ability to perform.
7	Continued observation is required for assessment of ability to perform.

Reps	Months											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1	X		X	X	X		X		X		X	
2	X		X		X		X		X		X	
3	X					X	X		X		X	
4	X	X	X	X	X		X		X		X	X
5	X			X		X		X		X		X
6	X	X	X	X	X	X	X		X	X	X	X
7	X				X	X	X	X	X	X	X	X

Information

Handling Conflicting Needs

All Field Representatives need their fair share of your field visit time allocation within the year. But “fair share” does not mean “the same.” A new hire, for example, will initially need extra field visit time. Anticipating well in advance *all* the demands on your time, including meetings and holidays, will help you to plan more effectively.

The chart below provides examples of conflicting needs and how they may be handled. Add your ideas to the chart.

Situation	Demands	Actions
Newly hired Field Representative	Product, service and disease knowledge application and skills development	Plan time in first year for more frequent visits
Above average performer	Reinforcement, learn about best practices	Arrange as usual; plan ahead.
Below average performer	Evaluation and development	Plan time for more frequent visits
Meetings	Unavailable	Put these dates in diary and plan around them
Holidays	Unavailable	Put these dates in diary and plan around them
Interviewing, administration days	Unavailable	Put these dates in diary and plan around them
Add your additional ideas		

Performance Self-Check

- ☐ Using the simulated calendar below, apply the considerations from page 55 and guidelines from page 56 to prepare a field visit schedule for your district.
- ☐ After completing your calendar, discuss it with a colleague for any needed refinement.

Reps	Months											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												

Action Checklist

?

Consider your schedule of field visits over the past year and your planned schedule for the coming year, and ask yourself :

- ☐ Do I need to identify my country standards for frequency of field visits?
- ☐ Do I need to develop personal standards for frequency of field visits?
- ☐ Can I identify how many, when, and with whom I have conducted field visits over the past year?
- ☐ Am I spending too much time with some Field Representatives, and not enough time with others?

Performance Aids

Here are some tips to keep in mind when scheduling field visits.

- Spend time with Field Representatives who really need you—by your determination or theirs.
- Don’t neglect more experienced representatives and representatives who are performing well.
- Following a new project release or major marketing strategy change, immediate field time with *every* representative should be a high priority.
- Base your schedule on each Field Representative's level of development needs.
- Alter or arrange your schedule according to current problems or opportunities in a territory.
- Schedule visits to coincide with quarterly reviews.
- Make adjustments when you sense a change in a Field Representative's behavior, whether positive or negative.
- Plan each month's field visit itinerary using last month's *actual*, annual holidays, meeting schedules, and routing schedules.
- Review each quarter your field visits frequencies for all Field Representatives to ensure adequate attention to everyone.

MODULE 4

Conducting

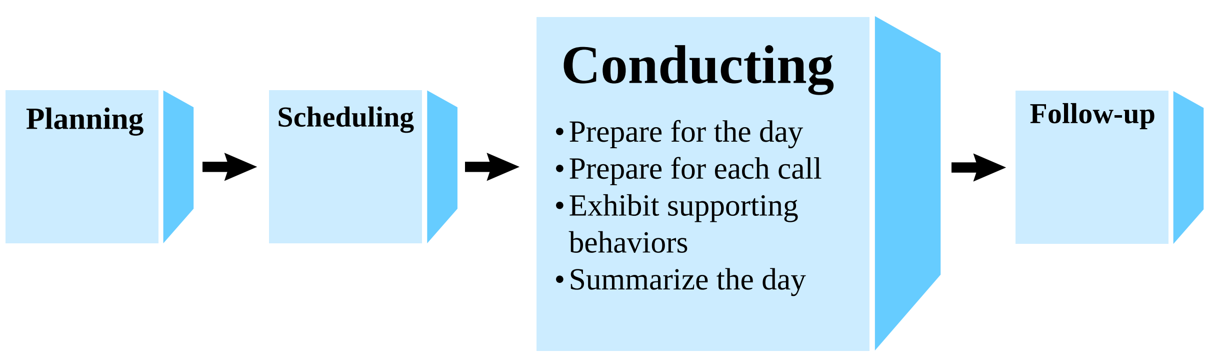
Introduction

The success of the field visit depends on your ability to observe behavior and give carefully considered feedback by coaching or counseling.
The intention here is to fine-tune and supplement your existing skills. Detailed training in coaching and counseling is covered in a separate course entitled "Coaching Basics."

Learning Objective

When you have completed this module, you will be able to:

- Cite the five actions that are likely to provide a good start to the day.
- Cite the four actions needed prior to each provider visit.
- Cite at least eight personal behaviors that are important for the Supervisor to exhibit throughout the field visit.
- List the three actions to summarize the day with the Field Representative.

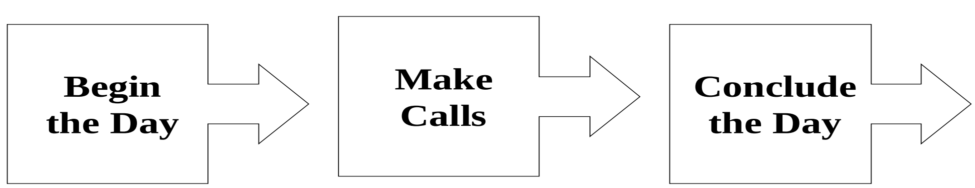


MODULE 4

Module Overview

This module covers the conduct of the field visit, from the start of the day, through all the provider visits, to the conclusion of the day.

- First we will look at how the day begins. The starting point is the review of the day's plans with the Field Representative.
- Next we consider the skills of observing behavior—that is, the things people *do* and *say.*
- During the day there are many opportunities for the Supervisor to assist the Field Representative.
- Following the provider visit the Supervisor should give feedback. Coaching is an essential part of giving feedback. We look at some rules for reinforcing performance and some situations where these rules apply.
- Finally, we consider how the day can be summarized.



Begin the Day
- **Review plans**
- **Clarify expectations**
- **Agree on activities**

Make Calls
- **Observe calls**
- **Note observations**
- **Provide feedback and reinforcement**

Conclude the Day
- **Summarize results**
- **Discuss follow-up**

Exercise

List below your own activities for starting the field visit day with a Field Representative. If you have not made field visits yet, think about the activities your former district manager might have followed when starting a field visit with you.

Information

I

Reviewing Plans for the Day

Before the first provider visit of the day it is important for you and the Field Representative to have some time together to prepare. Here are some suggestions for productively starting the day.

At the beginning of the day

1. Get an early start to allow plenty of time for discussing the plans for the day before the first provider visit.
2. Review development objectives.
3. Review your business objectives.
4. Discuss the schedule for the day.
5. Review times and logistics.
6. Ask and answer any questions.

Compare this list of activities with your list of activities for the start of the day.

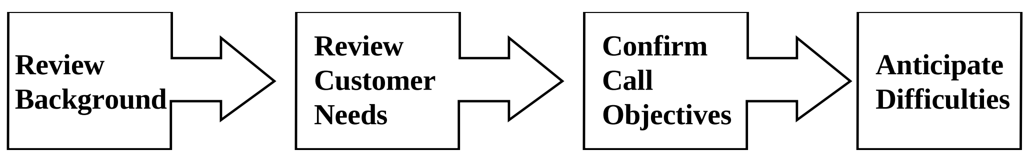
Exercise

List below your own activities preceding each provider visit. If you have not made field visits yet, discuss with other Supervisors about the activities regularly followed before each provider visit.

Before each provider visit

Before every provider visit it is important that you and the Field Representative understand and agree upon the provider visit objectives, how the development objective applies, and your respective roles during the provider visit.

1. Review background information on the provider.
2. Review the provider's current perspectives and needs for the products or services planned.
3. Confirm the Field Representative's provider visit objectives.
4. Discuss anticipated difficulties and how they will be handled.



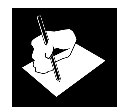
Compare these activities with your list of activities to prepare for each provider visit.

Observing Behavior

Once the provider visit begins it is your responsibility to observe the behaviors of the Field Representative and the provider. Your mental recording of their interactions will be useful later in giving feedback to the Field Representative on what happened during the provider visit.

Avoid judgments. Behaviors are actions taken and words spoken. Only the things people *do* and *say* are behavior. They can be observed, seen or heard, and any number of people would agree on what was said or done. Behavior can be recorded accurately. The reason for focusing on behavior is that it helps avoid disagreements over opinions or interpretations.

Practice



In the spaces below add your own examples of *positive* and *to improve* behaviors.

Examples of Positive Behaviors Observed

- Asked an open question.
- Described the patient's disability.

Your Ideas

- ____
- ____
- ____
- ____
- ____

Examples of to improve Behaviors Observed	• Held materials so the provider had to lean forward. • Talked so softly the provider twice asked for repetition of what was said.
Your Ideas	• ______________________________ • ______________________________ • ______________________________ • ______________________________ • ______________________________ • ______________________________ • ______________________________

Feedback

Here are some examples of positive and to improve behaviors you might have noted during a provider visit.

Positive behaviors

- Stated what was understood by the provider's response.
- Converted features into benefits.
- Reminded the provider the informed choice.
- Introduced the Supervisor.
- Pointed with a pen to a place on the literature where the appropriate data was presented.
- Smiled/laughed at humorous statements by the provider.
- Looked at the provider while talking.

To improve behaviors

- Didn’t adjust the content to the adoption ladder.
- Talked while searching the materials.
- Did not answer the question asked.
- Began talking while the provider was reading a patient chart.

Add more positive and to improve behaviors and discuss with a colleague.

Information

Managing Your Own Behavior During Field Visits

Besides observing the Field Representatives' and providers' behaviors, you need to be conscious of your own behavior. The way you behave can reinforce a positive working relationship with the Field Representative or undermine all of your good intentions.

Here are some suggestions for appropriate Supervisor behavior during field visits.

Behaviors to exhibit

1. Act as an extra set of eyes and ears for the Field Representative in order to help the professional recall later what was said and done.

2. Sit out of the direct visual line between the Field Representative and provider in order to observe without distracting either.

3. Minimize your involvement. If the provider directs a question to you, answer it, and then redirect the discussion to the Field Representative.

4. Let the Field Representative schedule the day, recognizing that this planning is also part of their development.

5. Act as a consultant to the Field Representative. Offer to help with problems without imposing your views.

6. Coach promptly following a provider visit.

7. Give appropriate positive reinforcement for continued development.

8. Recognize and reinforce observed previous development skills.

9. Act as a role model. *Show* rather than tell.

Behaviors to exhibit, continued

10. At the end of the day summarize accomplishments compared to expectations.

11. Show enthusiasm. If you aren't enthusiastic about the job, how can you expect the Field Representative to be enthusiastic?

12. Listen to the Field Representative. When you're not sure about what the Field Representative means, ask—don't assume.

13. Coach or counsel, as warranted, in a neutral, unemotional, and professional manner.

14. Ask for any questions or concerns. Conclude with, "What else can I do to help you?"

15. Jointly decide on actions to be taken and dates for the next field visit.

Behaviors to avoid

1. Writing notes when the Field Representative and provider are talking (distracting).

2. Being used routinely to help with particularly difficult providers (does not encourage the Field Representative to fulfill his role).

3. Telling the Field Representative what to do and say (runs the risk of them becoming dependent on you).

4. Focusing exclusively on the negatives (damage the Field Representative's self-esteem).

5. Ignoring or minimizing negative behavior (encourages its continuation).

6. Correcting a Field Representative during the provider visit. (Unless it's critical, and then do it with tact! Remember, the Field Representative has to return to see that provider.)

Exercise

Read through once more the behaviors to exhibit and avoid. Beside each behavior, note a C, S, or N indicating:

C—I do this Consistently.

S—I do this Sometimes.

N—I Never do this.

Practice

The Supervisor has great influence over the day and can take certain actions to assure a successful visit.

Below are five valuable behaviors. For each one, develop two examples based on your experience:

1. An example of how *behaving* in this way can be beneficial.
2. An example of how *failing to behave* in this way can have negative consequences.

The first example is done for you to illustrate this practice exercise.

Behavior 1

Focus on behavior—who said what and who did what—without placing an immediate interpretation on the observed event. For example, “The doctor asked two questions together. He asked if taking the drug with food was necessary and what about interactions with some specific other medication.” As opposed to, “The doctor seemed ready to prescribe.”

Beneficial consequence:

Concentrating on exactly what was said and done helps to analyze situations more comprehensively. Describing the observed performance prevents jumping to conclusions or an opinion.

Negative consequence of failing to behave in this way:

A question by the provider could indicate a concern, a readiness to prescribe, or even a way to stop the Field Representative’s discussion. What other signals were given, verbally and nonverbally? Without verification, an incorrect conclusion might occur. Also, accurate behavioral description avoids debate over opinions or interpretations.

Behavior 2

Avoid intrusion into the Field Representative and provider interaction unless it is necessary to correct an error or respond to a question directed to you.

Beneficial consequence:

Negative consequence of failing to behave in this way:

Behavior 3

Jointly decide on follow-up actions the Field Representative undertakes.

Beneficial consequence:

Negative consequence of failing to behave in this way:

Behavior 4

At the end of the day summarize accomplishments compared to expectations.

Beneficial consequence:

Negative consequence of failing to behave in this way:

Behavior 5

Maintain neutral body posture, facial expression, and voice tone when coaching.

Beneficial consequence:

Negative consequence of failing to behave in this way:

Feedback

All your *beneficial consequences* should, in some way, make it easier for the Field Representative to understand and achieve their and your development objectives. The beneficial consequences should show your concern to remove obstacles and constraints.

Check that your examples of *negative consequences* are not simply the reverse of the beneficial consequences. For example, “Field Representative learns how to handle a difficult situation,” and, “Field Representative does not learn how to handle the situation.”

You will find it easier to derive these negative consequences if you put yourself in the Field Representative's position. If applicable, try to recall your own experiences as a Field Representative: “How did I feel a few years ago when the Supervisor intervened in my conversation with the provider?”

Behavior 2

Avoid intrusion into the Field Representative and provider interaction unless it is necessary to correct an error or respond to a question directed to you.

Beneficial consequence:

Field Representatives get an opportunity to show their knowledge and skill.

Negative consequence of failing to behave in this way:

You undermine the Field Representative’s credibility with the provider.

Feedback, continued

Behavior 3

Jointly decide on follow-up actions the Field Representative undertakes.

Beneficial consequence:

Encourages the Field Representative to think openly and explore ideas together.

Negative consequence of failing to behave in this way:

Telling the Field Representative what to do says you believe he is not capable of creating good follow-up actions.

Behavior 4

At the end of the day summarize accomplishments compared to expectations.

Beneficial consequence:

Helps the Field Representative realize his accomplishments.

Negative consequence of failing to behave in this way:

The Field Representative does not hear confirmation that you recognize all his accomplishments.

Behavior 5

Maintain neutral body posture, facial expression, and voice tone when coaching

Beneficial consequence:

Encourages the Field Representative to think creatively.

Negative consequence of failing to behave in this way:

Showing your biases tells the Field Representative what to do. This leads to dependence on you and your workload increases.

Information

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The Post-Provider visit Discussion Guidelines	Conducting an effective post-provider visit discussion is a pivotal step in the field visit. It is your opportunity to discuss specific behaviors while they are fresh in both your and the Field Representative's memory.
Timing	Coach as close to the event as possible.
Accuracy	Coach based on an accurate behavioral observation.
Location	Ensure the location is private.
Practice	Begin coaching after the first provider visit so there will be an opportunity to carry out the follow-up actions in provider visits later in the day.
Responsiveness to Field Representatives	Listen and respond to the Field Representative's own interpretation of performance based on the coaching.
Confirmation	Seek confirmation that the Field Representative values the coaching and agree to take follow-up actions in later provider visits.
Motivations	Give positive reinforcement for incremental improvements to encourage the Field Representative's continuing efforts.
Quantity	Limit coaching to a small number of subjects to allow complete concentration and focusing by the Field Representative.

Exercise

Discuss the list of guidelines on the previous page with your colleagues. In the space below, note how applying the guidelines benefit the Field Representative and the Supervisor.

Guidelines	***Benefits from applying the guidelines***
Timing	Rep: Mgr:
Accuracy	Rep: Mgr:
Location	Rep: Mgr:
Practice	Rep: Mgr:
Responsiveness to Field Representatives	Rep: Mgr:
Confirmation	Rep: Mgr:
Motivations	Rep: Mgr:
Quantity	Rep: Mgr:

Reinforcing Behavior

When discussing a provider visit it is important to reinforce those behaviors you want the Field Representative to continue, and discourage those behaviors you want the Field Representative to stop. There are five basic rules for reinforcing and discouraging behavior.

Rule 1. People will be more likely to repeat a behavior if it is followed by a pleasant event.

Rule 2. People are more likely to imitate behaviors of people they admire—people they view as having status or success.

Rule 3. People will usually repeat negative behavior if no unpleasant event follows.

Rule 4. People will be less likely to repeat a behavior if it is followed by an unpleasant event.

Rule 5. People will be less likely to repeat a positive behavior if it is followed by nothing at all (that is, it is ignored).

Practice

For the following examples, write the number of the rule that is illustrated.

_____ *I tried out that new idea of yours and the provider did not like it at all.*

_____ *I saw a colleague make the presentation to the providers at the group meeting. It was very successful. I think I will try that technique next time.*

_____ *It was certainly worth listening to what he had to say . . . I know he has very good results in this area.*

_____ *I have asked my manager several times now for some assistance with this. He says he will help but then never gets around to it. I won't ask again.*

_____ *The Supervisor said that because we had such a good day he was going to drop in on me next week as well.*

_____ *Usually I don't look forward to field visits from my manager, but last time the day went so well that I am looking forward to the next time.*

_____ *My manager wants me to complete paperwork after each provider visit, but he never says anything when I don't do it.*

Feedback

Check your answers with these.

4 *I tried out that new idea of yours and the provider did not like it at all.*

2 *I saw a colleague make the presentation to the providers at the group meeting. It was very successful. I think I will try that technique next time.*

2 *It was certainly worth listening to what he had to say . . . I know he has very good results in this area.*

5 *I have asked my manager several times now for some assistance with this. He says he will help but then never gets around to it. I won't ask again.*

4 *The Supervisor said that because we had such a good day he was going to drop in on me next week as well.*

1 *Usually I don't look forward to field visits from my manager, but last time the day went so well that I am looking forward to the next time.*

3 *My manager wants me to complete paperwork after each provider visit, but he never says anything when I don't do it.*

Information

Guidelines for Summarizing the Day

After all provider visits and their feedback discussions have been completed for the day, it is important to summarize the total field visit.

1. Restate the development and business objectives of the day.
2. List behaviors plus positive results supporting both the development objectives and business objectives.
3. Identify relevant behaviors omitted, incomplete or incorrectly applied.

Examples of Statements Beginning the Summary

- *Your creativity was evident today. You* did...(List behaviors seen.) ...(List behaviors seen.)
- *Your problem-solving ability was at its best. With Dr. Martin you ...* ...(List behaviors seen.)
- *You know your people well, and they expressed appreciation for your efforts and your willingness to help. In the case of...* ...(List behaviors seen.)
- *Today I saw evidence of improving relationships with your providers. For instance ...*
- *Your PBC communication skills were evident. Today you focused on...*
- *An area we should continue to work on is …*
- *An opportunity for further development is your use of …*
- *As you noted after several provider visits today, some questions failed to get the information you sought. You suggested …*
- *At midday you pointed out your summary twice lacked a close. Your provider visits during the afternoon all included a close and the response was positive in each one.*
- *In three provider visits today we agreed your discussion of reprints omitted the methods section...*

Performance Self-Check

Completing this performance check will help you put new ideas to work in your district immediately. When you have completed your answers, discuss them with a colleague. Once you are satisfied with your answers, discuss them with the manager.

List five actions that can get the day off to a good start.

1. ______________________________
____

2. ______________________________
____

3. ______________________________
____

4. ______________________________
____

5. ______________________________
____

List four actions taken before each provider visit.

1. ______________________________
____

2. ______________________________
____

3. ______________________________
____

4. ______________________________
____

Performance Self-Check, continued

List eight behaviors that are important for the Supervisor.

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________

List the three actions you can take to summarize the day with the Field Representative.

1. ______________________________
2. ______________________________
3. ______________________________

Action Checklist

?

The Big Question

There is one question you should always ask yourself at the end of a field visit day.

Am I leaving the Field Representative encouraged to work well alone?

What can I do to answer "YES" to that question?

Performance Aids

A checklist for successfully conducting field visits:

- ☐ Meet early with the Field Representative to review plans for the day.
- ☐ Clarify expectations for the day.
- ☐ Agree on activities for the Field Representative and Supervisor before each provider visit.
- ☐ Observe the Field Representative and the customer during the provider visit.
- ☐ Review, coach, counsel, and reinforce the Field Representative throughout the day.

  (see coaching basics training)
- ☐ Summarize the field visit day and discuss plans for follow-up.

MODULE 5

Following Up

Introduction

Follow-up is a critical component in sustaining the gain from the field visit. It is a building block for the next field visit and a contribution to the Field Representative’s annual appraisal.

This module presents ideas for reflecting and reporting on the day’s events and monitoring the performance improvement results.

Learning Objective

After completing this module, you will be able to:

1. Prepare 2 field visit reports for Field Representatives with whom you recently worked.

   Each report will contain:
   - Behavioral descriptions of observations
   - Actions the Field Representative will take to maintain or continue development
   - Actions the Supervisor will take to support the Field Representative’s development
   - A method for monitoring performance development

2. Discuss with your manager what makes a good day for both Field Representatives and their managers.

Module Overview

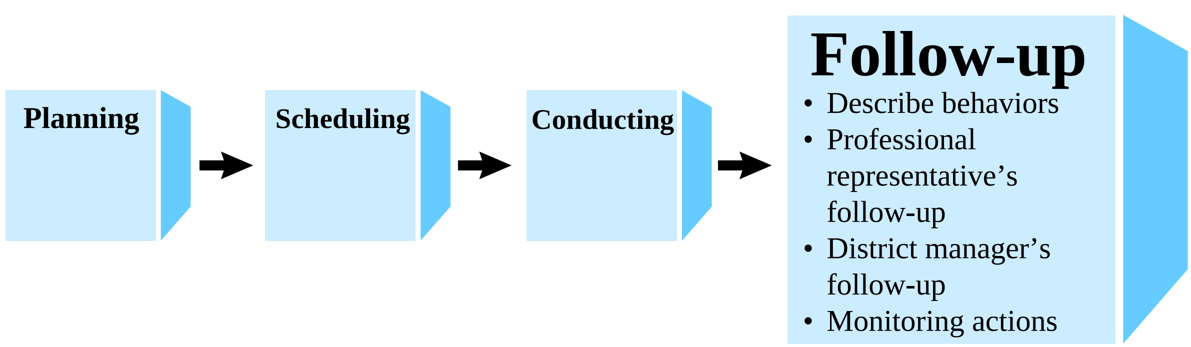
Good field visits end as they begin—with development objectives. Development objectives should be viewed as part of a continuous performance improvement strategy. As one field visit comes to a close, objectives for the next visit are prepared.

Once the field visit is completed, the Field Representative continues working alone. Keeping in touch to monitor and reinforce performance takes planning and organization. This module will present suggestions on how to follow up.

Finally, documenting the field visit gives you a reference point to return to on an ongoing basis, especially at performance appraisal time.

Documentation need not be burdensome or detailed. Following the criteria we present will help you make sure your field visit reports are useful for you and the Field Representative.

The diagram here summarizes the key components of follow-up.



Information

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Field Visit Reports

Concise, well-prepared field visit reports are invaluable documents for tracking skill development of Field Representatives and your efforts to help them succeed. They need not be burdensome or time-consuming.

Purpose

The primary purposes of the field visit report are:

- To document performance issues.
- To motivate by recognizing and reinforcing desired performance.
- To clarify goals and plans.
- To supply useful information for preparation of annual performance reviews and performance development goals.
- To supports laws, policies, regulations.
- To assure continuity.

Guidelines

A well-prepared field visit report should be written in brief behavioral style and limited to one page, if at all possible. A suggested format is illustrated on the next page.

Suggested Format for Field Visit Reports

Field Representative	**Work Date**
Supervisor	**Location**
Field Representative Objectives	
Manager Objectives	
Observations (attach PBCC coaching sheet)	
Field Representative Actions	
Supervisor Actions	
(Field Representative Signature)	(Supervisor Signature)
Copies to: 1) Field Representative 2) Supervisor 3) N+2	

Do's and Don'ts for Field Visit Reports

Do	Don't
• Summarize the day's activities related to the agreed development objectives. • Note the location of the calls. • Focus on behavior. • Highlight areas of excellence and improvement. • Note any agreements, including follow-up actions and completion dates. • Highlight opportunities for development. • Include a distribution list.	• Describe the entire day's activities in detail. • Use slang. • Make irrelevant personal comments. • Make inappropriate remarks about competitors. • Exaggerate specific strengths or weaknesses. • Threaten the Field Representative's job security • Criticize providers' personalities or abilities. • Criticize policies.

Practice

An example of a completed field visit report appears on the next page. Study this report, and then work with your colleagues to answer the questions below.

When you have completed your discussion of this example, continue to Example 2 on page 111.

Example 1

What, if anything, is missing from this report?

What value has this report for the Field Representative and his/her manager?

What would you add to make this report appropriate for your country?

Example Field Visit Report 1

Field Representative *Marilyn Schmidt*	**Work Date** *2 Feb 13*
Supervisor *Carl White*	**Location** *Backer*

Field Representative Objectives

1. *Use open questions to determine provider's perspective of [product or service].*
2. *Demonstrate listening skills progress by using paraphrases and summaries.*

Manager Objectives

Observe and assess time management as possible cause of decreased daily call average.

Observations

1. *Open questions achieved objectives for all 4 providers in discussions of [product/service]. With 3 Providers, samples were requested for trials with patients taking [competing product]. One provider requested published evidence concerning dosage.*
2. *Paraphrases and summaries were used properly in all discussions.*
3. *Contingency planning lacking. Could see others, rather than wait long time (more than 1 hour) for important doctor.*

Field Representative Actions

1. *Develop contingency plan for calls.*
2. *Incorporate "benefits" into [product/services] discussions.*

Supervisor Actions

1. *Review contingency planning.*
2. *Identify "benefits" message for [product].*

(Field Representative Signature)	(Supervisor Signature)

Copies to: 1) Field Representative 2) Supervisor 3) N+2

Example Field Visit Report 2

Field Representative *Ray Kirk*	**Work Date** *2 Feb 13*
Supervisor *Helen Moss*	**Location** *Area IV*

Field Representative Objectives

1. *Territory management planning: Provider priorities, routing. Discuss/review early a.m.*
2. *Reprints—demonstrate use, get manager sign-off for PBCC.*

Supervisor Objectives

Assign and discuss role for next district meeting.

Observations

1. *Provider priorities based on Ray's data analysis, supported by office observations and statements showing interest in [disease]. Well done!*
2. *Satisfactorily met criteria for completing PBCC.*

Field Representative Actions

1. *Practice introductions to shorten time needed.*
2. *Prepare to informed choice segment on [;;;] and chairing the workshop feedback discussion at next district meeting.*
3. *Use "reasonable expectations" as means to give balanced perspective. Two providers stated appreciation for knowing what could go wrong and probability of occurrence.*

Supervisor Actions

1. *Observe introduction and open the call during next field visit.*

(Field Representative Signature)	(Supervisor Signature)

Copies to: 1) Field Representative 2) Supervising Manager 3) N+2

Example 2

What, if anything, is missing from this report?

What value has this report for the Field Representative and district manager?

What would you add to make this report appropriate for your country?

Feedback

Example 1

What, if anything, is missing from this report?

Methods of monitoring actions were not included

What value has this report for the Field Representative and Supervisor?

- documents performance issues and improvements
- clarifies goals and plans
- documents follow-up actions

What would you add to make this report appropriate for your country?

Feedback

Example 2

What, if anything, is missing from this report?

- No follow-up monitoring activities identified
- No follow-up actions identified for district manager
- No identification of performance issues for further development

What value has this report for the Field Representative and Supervisor?

- documents performance improvements
- clarifies rep's goals and plans, and. manager's goals

What would you add to make this report appropriate for your country?

Practice

Use the blank form on the next page to write a field visit report for a Field Representative you have worked with recently. When finished, be sure to save it to use in your Performance Self-Check review with your colleague and then with your own manager.

You may want to organize your thoughts in the space below before entering information on the worksheet. Refer to the guidelines in this module as you work.

Notes

Field Visit Report

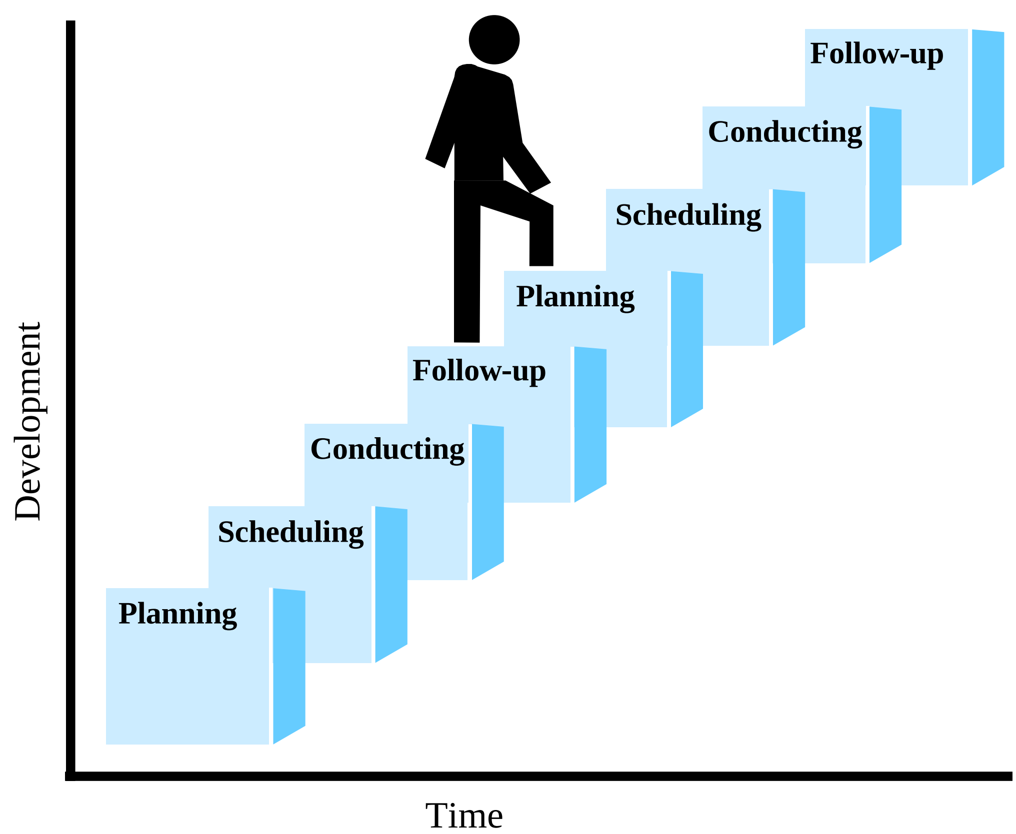
Field Representative	**Work Date**
Supervisor	**Location**
Field Representative Objectives	
Supervisor Objectives	
Observations	
Field Representative Actions	
Supervisor Actions	
(Field Representative Signature)	(Supervisor Signature)
Copies to: 1) Field Representative 2) Supervisor 3) N+2	

Information

Planning Objectives for the Next Visit

Development is a continuous process. Each field visit should be a step up in the building of knowledge and skills. Periodic reinforcement of past achievements maintains progress. Ideally, all of this takes place in a smooth progression as shown in the diagram below.

Development Continuum



Criteria

The criteria that apply to follow up development objectives you define at this point are the same ones we discussed in Module 2, Planning. Development objectives need to be:

- Relevant to the job.
- Specific, focused on behavior.
- Manageable yet challenging.
- In priority order.

In addition to these criteria, follow-up development objectives should:

- Enable the Field Representative to consolidate knowledge and skills.
- Maintain consistency with previous development objectives.
- Reflect the overall plan for the Field Representative’s development.

Example

Development Objectives

Our objectives for this trip were to check on the status of [Product/service] at your hospitals, review your second quarter performance with regard to your annual statement of objectives, and to observe your skill of using open questions to get providers involved.

Observations

You found some gaps in the information about the informed choice in Safe Abortion centers (SAS). However, your performance measured against objectives during the second quarter showed considerable improvement and matched expectations. You followed the guidelines for effective use of open questions in two meetings with providers, but not with three others.

Follow up Development Objectives

During our next field visit you suggested we work on three objectives: 1) to complete the information needed on the informed choice in SAS; 2) to continue the review your performance in relation to your annual statement of objectives; and 3) to observe your use of open questions to get providers involved.

In this example, do the follow-up development objectives

- Enable the Field Representative to consolidate knowledge and skills?
- Maintain consistency with previous development objectives?
- Reflect the overall plan for the Field Representative's development?

Feedback

The follow-up development objectives met all the criteria. The Field Representative had met some objectives, but not all of them. So the development objectives for the next visit

- Consolidated the Field Representative’s skill development needs.
- Reinforced the original objectives.
- Reflected the long-term plan for the Field Representative’s development.

Practice

Below are descriptions of two field visits. In the space provided, write follow up development objectives for the next field visit based on the criteria.

Case 1

The objectives for this field visit were: 1) to observe the nurse advocate program for [Product/service]in City; and 2) to observe the Field Representative's use of support materials in discussions of family Planning products and services.

The results of the field visit were: 1) the nurse advocate program in City Hospital was progressing well, with new opportunities for seeing people and for making a contribution; 2) discussions of family Planning products and services were limited. Of the three calls that were planned, one was changed to meet the provider's interest. The second opportunity lacked the proper introduction. After a coaching discussion and practice, all the criteria for effective use were met in the third provider call.

Based on this information, write follow-up development objectives for the next field visit.

Case 2

Since the beginning of the year this Field Representative's call frequency on targeted providers has increased from 2 to 3, well below the expected 5. The provider record cards and routing planner also showed little evidence of use.

Based on this information, write follow-up development objectives for the next field visit.

Feedback

Development is a continuous process. Reinforcement of past achievements maintains progress.

Case 1

In this situation, there is clearly a need to consolidate the knowledge and skills of the Field Representative.

- The nurse advocate program seems to be functioning well. To reinforce this achievement, the objective for the next field visit should be to continue monitoring these results.

- Since the Field Representative still has some difficulties using support materials, this objective will need to be repeated with continued coaching.

Your suggested follow-up development objectives should not be a complete departure from the themes of the previous objectives. The need here is to build on each success and to coach the Field Representative along a development plan.

Case 2

Your follow-up development objective for this Field Representative needs to be a restatement of the original one. There has been minimal progress on the call frequency rate and little evidence of progress using customer records and the routing planner. Coaching will be needed before the next visit. Your objective should focus on the specific behavior of using records and a routing planner to increase call frequencies.

Information

Reinforcing Performance

In the preceding “Module 4: Conducting,” we examined the importance of providing positive reinforcement to the Field Representative during the field visit. Now we have the opportunity to give this reinforcement following the field visit. Remember, *Field Representatives are more likely to repeat behavior that is followed by a positive event*.

Look for opportunities to “catch the Field Representative doing it right.” When you have worked with a Field Representative on improving a particular aspect of performance and the Field Representative demonstrates improved performance, reinforce it *positively* and *immediately*.

What you want is for this new behavior to *continue*, and people tend to continue a behavior they find rewarding. This does not mean that you will never again need to coach. But the more you reward improvements, the more likely the Field Representative will view coaching as supportive.

Another reminder—what you view as positive reward may not be viewed that way by the Field Representative. Words of encouragement and congratulation are always welcomed, but extra assignments may not be. Some Field Representatives will be proud that you’ve asked them to prepare an important report or to work with a junior Field Representative. Other Field Representatives may feel “punished” by such assignments. It’s critical to know what motivates each person.

Practice

Take a few minutes now to consider ways to provide appropriate reinforcement for performance you observe during a field visit.

Reinforcing good performance

Write your suggestions for reinforcing desirable performance in the space below. An example is provided to get you started.

Example: Phone the Field Representative to praise improvement and offer continuing support.

Your Ideas

Improving problem performance

Write your suggestions for appropriately following up when the Field Representative's performance is less than acceptable. Again, an example is provided to get you started.

Example: Break the performance into smaller segments.

Your Ideas

____

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Feedback

Compare your lists with the ones below. Discuss your suggestions with your colleagues and note ideas that you think will be especially useful to you in working with your Field Representatives.

Reinforcing Good Performance

- Telephone the Field Representative to praise improvement and offer continuing support.
- Send a congratulatory e-mail or memo.
- Recognize accomplishment at a meeting.
- Make it possible for others to hear about it.
- Give leadership assignments at district meetings.
- Ask the Field Representative to work with a peer who needs help.
- Put achievements in the field visit report.

Improving Problem Performance

- Break the performance into smaller segments.
- Analyze the performance problems.
- Coach, if the Field Representative wants to change behavior.
- Identify negative consequences for undesired behavior.
- Counsel, if the Field Representative shows no signs of wanting to change behavior.
- Arrange practice.
- Suggest ways of helping memory recall.

Information

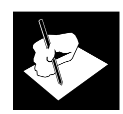
Monitoring Results

There are opportunities for the manager to monitor progress and results between scheduled field visits. Ideally, these opportunities should come from the Field Representative. If he is unable to generate ideas, the Supervisor should suggest some known to produce the desired results. For example:

- Ask the Field Representative for his ideas on keeping you aware of his development progress.
- Ask the Field Representative what he intends to do between today and your next field visit.
- Ask the Field Representative to call you or send you an e-mail memo on a scheduled date to give you an update on progress.
- Suggest the Field Representative practice with a colleague and call weekly to tell you about progress.

\

Practice



What other monitoring actions can you suggest here? Write your suggestions below.

____

____

____

____

____

Feedback

The purpose of monitoring is to be sure that the Field Representative's performance is improving, not declining, between field visits. Ideas from the Field Representative may include:

- Agree on a regular time to review progress, either by phone, electronically or in person.
- Work with a colleague to review progress on the objectives.
- Include progress comments on weekly reports or special reports.
- Arrange breakfast meetings before next field visit to review progress.
- Seek information from a friendly provider who enjoys teaching.

Discuss these suggestions with your colleagues and add any additional ideas you generate.

Information

Reflections on "A Good Day"

The comments below came from Field Representatives who were asked: "*What makes for a good field visit with your manager?"*

The Field Representative's point of view

It was a good day because my manager . . .

- *Was happy with my performance and complimented me.*
- *Shared ideas being used successfully by other provider reps in the district.*
- *Did not interfere with any of my discussions.*
- *Gave me suggestions on how to handle obstacles.*
- *Gave specific examples of how my performance had improved.*
- *Reviewed my performance objectives and gave me suggestions on how to reach my goals.*
- *Allowed time for a lunch so that we could discuss problems and concerns.*
- *Helped me improve my skills by observing and listening during my discussions and then, after the call, pointing out things I had missed.*
- *Cleared up some product-related questions.*
- *Helped me to secure funding for a special project.*
- *Helped me to evaluate each call and develop specific plans for follow-up.*
- *Helped me address some obstacles that I had with specific providers.*
- *Was relaxed and occasionally talked about nonbusiness matters.*
- *Treated me to lunch.*
- *Helped me recognize communications skills that needed improvement as well as ones that I did well.*

Practice

Now consider the day from your point of view as the manager. Note your thoughts about what makes for a good field visit day.

The Supervisor's point of view

Example: Field Representative's plans flowed smoothly, allowing opportunities for me to observe skills.

Your Ideas

Discuss your list with a colleague and add any new ideas to your list.

Feedback

These comments came from Supervisors:

- *The Field Representative planned a normal day, leaving time for coaching between appointments.*
- *The provider rep prepared contingency plans.*
- *We were able to keep to our plans and timetable.*
- *The Field Representative had prepared questions for discussion with me.*
- *The Field Representative showed enthusiasm and seemed to enjoy the day.*
- *The provider rep was prepared to discuss development issues.*
- *I could tell that the Field Representative had practiced the skills we worked on during the previous field visit.*

Performance Self-Check

- [ ] Get the Field Visit Report you completed in the practice, page 117 in this module. Then, use the blank form on the next page to develop a second report for a recent field visit with another of your Field Representatives.

- [ ] Recall the objectives the Field Representative and you had, and your observations of the Field Representative's performance. If you did not have prepared objectives, write objectives you might have had.

Performance Self-Check Field Visit Report

Field Representative	**Work Date**
Supervisor	**Location**
Field Representative Objectives	
Supervisor Objectives	
Observations	
Field Representative Actions	
Supervisor Actions	
(Field Representative Signature)	(Supervisor Signature)
Copies to: 1) Field Representative 2) Supervising Manager 3) N+2	

Performance Self-Check

☐ Review your list of thoughts concerning how a Field Representative and Supervisor might both conclude that the time spent together was beneficial.

☐ Prepare to discuss this with your manager and your colleague.

Performance Discussion

☐ How is my use of the telephone?

☐ Can I make better use of e-mail memos?

☐ How will I inform my Field Representative about my expectations?

☐ How will I keep my manager informed about my field visit activities?

☐ Do I need to complete field visit reports for other recent field visits?

☐ Do I need to develop monitoring activities for recent field visits?

☐ What actions do I need to take to follow up on recent field visits?

Performance Aids

Following are blank Field Visit Reports, supplied for your use on the job.

Field Visit Report

Field Representative	**Work Date**
Supervisor	**Location**
Field Representative Objectives	
Supervisor Objectives	
Observations	
Field Representative Actions	
Supervisor Actions	
(Field Representative Signature)	(Supervisor Signature)
Copies to: 1) Field Representative 2) Supervising Manager 3) N+2	

Field Visit Report

Field Representative	**Work Date**
Supervisor	**Location**
Field Representative Objectives	
Supervisor Objectives	
Observations	
Field Representative Actions	
Supervisor Actions	
(Field Representative Signature)	(Supervisor Signature)
Copies to: 1) Field Representative 2) Supervising Manager 3) N+2	

Counseling

Purpose

To provide guidance to supervisors on how to conduct counseling for performance issues that PSI Field Representatives may display

To provide guidance to field staff on how to handle provider performance issues

In this module, you will find:

- Why it is important to provide counseling to remediate performance issues.
- Guidance on providing counseling to PSI Field Representatives in order to improve performance issues
- Template forms that can be used to document PSI field staff performance issues and progress
- Guidance on how to handle provider performance issues

After completing this module, you will be able to:

1. Utilize the guidance and forms provided to counsel PSI Field Representatives or Providers that are displaying performance issues.

What?

There are often situations in which SMART Objectives have been agreed upon (more information in “Management by Objectives” module) and Coaching has been consistently conducted (more information in “Coaching” module), yet the PSI Field Representative displays poor performance. For instance, a PSI Field Representative may not be demonstrating the ability to positively impact provider behavior change or may not be completing the administrative aspects of their job accurately enough or in a timely way.

There may be many reasons why performance issues occur. These may be related to the individual, such as ability, motivation, health, etc., or may be environmental factors, such as company processes and changing business priorities. If the PSI field representative needs assistance, needs help recognizing the problem, or is not willing or able to improve performance, counseling is required.

WIIFM?
What’s in it for me?

It is critically important for the Supervisor to counsel the Representative in order to remediate the performance issue that is disabling him/her from achieving the desired business results. This will lead to improved performance and allow the employee to progress in their career. This will also improve any negative influences that the employee may be having on the rest of the team. Finally, this will play a large role in building a strong relationship between the Representative and Supervisor.

How?

<u>The following are steps to remediate PSI Field Representative performance gaps by using counseling, documentation and disciplinary action:</u>

- Assess if the performance gap is a "skill" (competency) or "will" (motivation) issue
- Begin with verbal coaching and document all discussions
- Apply solutions to address the "skill" issue such as training and mentoring. If it is a "will" issue, it may require discussions on whether this position is the right job fit for the individual. This may also require discussions on the impact the lack of performance has on the employee as well as on the rest of the team and on the company.
- Set a time frame for the expected improvement given the need to absorb new skills via a Performance Expectations Memo.
  Template:

Performance Expectations Memo.d

- If there is no improvement after the expected time frame, deliver a Performance Improvement Plan that outlines possible consequences that may involve termination. Consult with your own Manager and with HR.
  Template:

  Performance Improvement Plan.do

Note: If there is any suspicion of fraud by a PSI Field Representative or Supervisor/Manager, the remediation process will follow a different path. Immediate action through a comprehensive investigation should be conducted, and depending upon the outcome, disciplinary action including termination may be warranted. All PSI materials (training and Territory Management Files of the Rep and Managers) should be delivered to PSI in the event that the field employee leaves the company due to voluntary or involuntary termination. PSI should consider developing a Code of Conduct and Ethics which each manager and representative would sign at the start of employment. This document would provide clarity on expectations and consequences when policy is broken.

Performance issues may also occur with Providers. For instance, a Provider may not be achieving the franchise quality standards. The process of managing a performance issue, whether it is a field representative or a provider, is very similar.

How?

<u>The following are the steps that should be taken to remediate Franchise Provider performance gaps:</u>

- Discuss your observations with the provider and note quality deficits in your provider performance report and/or your clinic notes. Be specific about the gaps you are observing and the remediation steps. Check for provider understanding. Assess if the gap is related to *opportunity, attitude, or motivation*. Discuss the provider situation with your Supervisor/Manager in order to identify additional actions that can be taken.

- Prioritize this provider for a subsequent visit within a reasonable period of time. Assess the provider and document the identified gap areas along with possible solution (i.e., training, coaching, and equipment). Outline a time period by which the gaps should be corrected. This time period should be agreed upon with your Manager. Outline consequences of not correcting within a reasonable period of time, which can be loss of franchise status.

- If the gap areas persist, issue a written notice that their franchise status is being revoked. Work out the logistics of picking up PSI owned equipment and resources. A letter that discontinues the franchise should be sent from the Supervisor/Manager.

Example

- Example of Best Practice From Kenya:

PSI Criteria Prov Retention.doc

Self-Learning Questions:

- What are some reasons that Performance issues occur?

- Why is it important to counsel a PSI Field representative that is displaying a performance issue?

- What should a supervisor do if a PSI Field Representative is displaying poor performance due to lack of ability?

- What should a supervisor do if a PSI field representative is displaying poor performance due to lack of willingness?

- What is the first form that can be used to remediate a performance issue that a PSI Field Representative is displaying?

- If there is no improvement after counseling, what should a supervisor do? What is the form that should be used?

<u>Action Items:</u>

1. Attend the coaching one day course when available. This course provides additional information on the process of counseling.
2. If there are any known performance issues with PSI Field Representatives or providers, utilize the guidance and forms provided to resolve them.

TO: LOC:

FROM: LOC:

SUBJECT: Performance Expectations Memo DATE:

This memo is to summarize the conversation we had on X date regarding my expectations of you going forward.

During the last X months, we have had numerous discussions regarding your performance (site the dates you spoke on Field Trip Visits, Year End Review, etc.). We have discussed (insert text) as an area in which you have not been meeting expectations. These discussions have not resulted in an improvement in performance.

Specifically, you have not been meeting expectations in the following behaviors:

- Insert items
- Insert items

1: Below Average Provider Visit and Sample Activity (Titling each section helps employee clearing identify the major issue.)

Expectation: (What is it that the company (and you) expects of the individual? Sample follows): Routing should be based on 2012 targets for your assignment, with a goal of a minimum of 8-10 targeted provider calls per day, including 2 pharmacy calls per day. It is expected that representatives meet the required reach and frequency targets as established by the tactical plan. Routing should be based on segments and targets, not towns or group practices. It is expected that representatives deliver two full product discussions on every call. Product discussions should each last an equal amount of time. These discussions should be centered on the most important message for the provider, using PBCC, along with other differentiating messages.

Failure to Meet Expectations: (In this section, we include examples of how the employee does not meet the expectation. This should be clear examples of observed or recorded behavior, actions, failure to act etc). Between January 2012 through April 2012 you reported monthly calls of 55, 30, 34 and 84, respectively. For the same time period, you reported the following calls with samples: 24, 6, 9 and 32, respectively. This is an average sampling rate of 17.8% which compares to the district average of 53.12% and a national average of 47.01% for this timeframe.

Required Improvement: (This is where you indicate what you specifically expect the rep to do, when and how. Sample follows): You should be making and recording "x-number" weekly calls or "y-number" monthly against targeted providers. At least x% of your calls should be supported with samples.

2. **Use of PBC Resources.** **(Titling each section helps employee clearing identify the major issue.)**

Expectation: (What is it that the company (and you) expects of the individual? Sample follows): The Company expects representatives to deliver relevant approved messages in a persuasive way to reinforce beliefs and utilization. Use of approved resources that support the delivery of relevant, approved messages is required.

Failure to Meet Expectation*:* (In this section, we include examples of how the employee does not meet the expectation. This should be clear examples of observed or recorded behavior, actions, failure to act etc.) During our last two field visits, you did not use ANY approved resources. You stated that you were not comfortable using approved resources to supplement your discussions and therefore did not like to use them.

Required Improvement: (This is where you indicate what you specifically expect the rep to do, when and how. You should also provide ideas on how to achieve the required improvement such as remedial studying or coaching. Sample follows): Effective immediately, you are to use approved resources to supplement your PBC calls based upon the providers's beliefs on every call. This includes: job aids, reprints, etc. In order to get you comfortable and prepared we discussed the following actions:

- Pick a job aid every week and read it over, practice PBC discussions using the aid and then the following week use it regularly. This should be done with every job aid and reprint until you have done this will all of them.

Measurement: (In this section, you should note how you would assess progress and the employee's success in meeting the expectations. A sample follows): I will measure your improvement through my observations on field visits. The more you practice and use these resources, the more familiar you will be with the material and the easier it will be for you to use on provicer calls.

3. **Provider Knowledge**

Expectation: It is expected that a representative have a sound knowledge of their providers, office and markets. This is demonstrated through rapport and advocacy with providers and key members of each office staff.

Failure to Meet Expectation: On our field visits on (dates), I observed that you had a difficult time seeing providers. I observed very little rapport with office staff members. Rarely, if at all, did staff members address you by name. In many of the offices, you had to be reminded of the dates and times to make appointments. All calls to providers preceded with an introduction as if you were meeting with them for the first time. This is not what is expected for someone calling on these providers for 6 months.

Required Improvement: You are expected to know your providers, office and markets. You should have rapport and advocacy with key members of each office staff. You are expected to use your knowledge of provider beliefs and needs to deliver a targeted message to your providers during every PBC discussion. To obtain this required improvement, we discussed the following plans of action:

- You are to prepare an assessment for each of your targeted offices that include: name of the office, number and name of target providers, name of key office staff, office hours, policy concerning pharmaceutical representatives, your access situation and your level of advocacy and rapport. This is due to me by (date).
- You are going to review with me, examples of targeted messages based on your analysis by (date).

Measurement: I will measure your improvement during field visits, during which you can present findings and demonstrate use of the above information.

The objective of providing you with this feedback is to help you improve your performance in areas in which you are currently deficient so you may successfully fulfill the objectives of your position. To that end, I am available to work with you and provide you with guidance and counseling. (During our conversation, you agreed XXXX) It is my hope that you will use the direction provided in this memo towards the re-establishment of an acceptable standard of performance. If improvement in these areas is not achieved, you will be placed on a Performance Improvement Plan (PIP) which may result in further disciplinary action, up to and including termination.

TO: **LOC:**

FROM: **LOC:**

SUBJECT: Performance Improvement Plan **DATE:**

(Introductory paragraph – what has occurred requiring individual to go on Performance Improvement Plan – sample below).

During the past few months, we have had numerous discussions regarding your performance. **[PROVIDE DATES, IF POSSIBLE]** We discussed key areas that needed improvement such as territory management, product presentations and administrative duties. These discussions have not resulted in the improvements required in order for you meet the performance standards of a PSI representative.

During my field visit on _________ , I reviewed these expectations again and advised you that you would be given a 60 day Performance Improvement Plan effective _____________________. .

That plan is set forth below.

PERFORMANCE IMPROVEMENT PLAN

1. **Promotional Materials and Product Presentations. [Titling each section helps employee clearly identify the major issue; the process below should be outlined for each issue that requires improvement.]**

Expectation: [What is it that the Company (and you) expects of the individual] For example: PSI expects that its representatives will comply with all medical/legal requirements in the detailing and promoting of products and is expected to provide balanced product discussions in a persuasive manner. …. USE language

Failure to Meet Expectation*: [In this section, we include examples of how the employee does not meet the expectation. Provide clear examples of observed or recorded behavior, actions, failure to act etc.] In this example, the manager would indicate instances where the rep did not offer balanced discussions with providers to reinforce informed choice regarding Family Planning, or no trial closes, etc.….*

Required Improvement: *[*Indicate specifically what you expect the rep to do, when and how.] Example: Effective immediately, you are expected to deliver balanced believable product discussions in a persuasive manner. Presentations should be appropriately adapted to the needs of the provider, should contain trial closes and, when appropriate, a closing question. Use approved product literature and job aides in discussions with providers. [INLCUDE EXAMPLES OF TRIAL CLOSES AND CLOSING QUESTIONS] [MAKE RECOMMENDATIONS FOR HOW TO IMPROVE SKILLS – FOR EXAMPLE, REMEDIAL STUDYING OR OTHER COACHING]

Measurement: [In this section, you should note how you would assess progress and the employee's success in meeting the expectations.] Example: I will measure your improvement through observation, feedback from providers and/or employees.

[This methodology is repeated for each and every area covered by the PIP. End with a conclusion.]

Conclusion

I will monitor your performance against this performance improvement plan over the next 60 days. It is important for you to understand that, unless you show immediate and sustained improvement in these areas, your employment may be terminated. **You also need to understand that this plan does not guarantee you two months to demonstrate improvement.** Your continued employment depends upon immediate improvement. If you demonstrate improvement, then I will evaluate your overall performance at the end of the PIP period. You also need to understand that successful completion of this plan will not relieve you from continued compliance with the expectations set forth in this document. *Additionally, placement on a PIP memo will have an impact on your rewards and award eligibility. There will be a 50% reduction in your annual bonus target. You will also be ineligible for any annual awards. You will not be eligible to receive any discretionary awards for the next 12 months, nor will you be eligible for any promotions or developmental opportunities during the next 12 months. Your planned Performance Based Increase has been eliminated for the year*. We need to see immediate and sustained improvement in these areas both in the short and the long-term.

It is my sincere desire that you turn the present situation around and remain employed with the Company. I will make myself available to help you in every reasonable way. If you have any questions about this document or what I expect from you, please ask me.

I will work with you on an on-going basis (e.g., field visits, E-mail and/or phone conversations). I will follow-up with written documentation of your progress on an as-needed or monthly basis. The ultimate responsibility for your success or failure is your own. I hope that you take advantage of this opportunity to turn this situation around.

Signed: ______________________/Date_______ (Business Manager)

Reviewed by: ______________________/Date_______ (Business Director)

I have read and understand the document:
Provided to: ______________________/Date_______ (Employee's Signature)

CC: PSI Personnel File (Signed-Original)
Employment Practices Consultant (via email)
Region Office

CRITERIA FOR RETAINING A PROVIDER IN THE TUNZA NETWORK

Preamble

Tunza family health network is a branded network of private clinics that was established by PSI in Dec 2008, under its Reproductive Health program. The projects aim is to increase access to and use of long acting methods of family planning by women of reproductive age in rural and peri-urban areas of Kenya.

Private family planning service providers who meet a set of minimum quality standards are selected to join the Tunza network. Service providers who accept the quality standards and policies specified by PSI sign an MOU with PSI committing to remain in the network for at least one year, and are required to complete a one week training to improve their clinical skills in IUDs and implants. Service providers who perform well in the training and are certified as being competent in insertion of IUDs and Implants begin to enjoy various benefits including: branding of their clinic with Tunza logo and colors, supportive supervision, branded items, continuous medical education and quarterly newsletter with the latest family planning updates.

Deficient Quality negatively affects utilization of services, safety and benefits to the clients and efficient use of health resources

Criteria to remain in the Tunza Network

Parameters
Agrees to the Terms set out in the Memorandum of Understanding
Attain 85% proficiency within 6-months of training.
Adheres to the Quality of Care standards (e.g. service delivery protocols, client counseling to ensure informed choice, infection prevention, and use of proper equipment).
Reports all adverse events and complications to the HSD team immediately clients present at the facility.
Attends all Tunza Refresher trainings unless they have communicated plausible reasons for their inability to the HSD team.
Has communicated a desire to remain in the Tunza network

Dropping out procedure

1. The first 3 criteria are absolute and will be a basis for drop off without any further remedial action.

2. HSD Quality Assurance Officer identification of providers who do not follow the set Tunza procedures based on the criteria based above

3. The HSD Quality Assurance Officer will inform the QA Manager

4. The QA manager will evaluate the case and identify if there are ways in which the provider can be capacity built so that s/he can meet the minimum set guidelines. An Improvement plan will be developed, documented and implemented with clear set goals and timelines. This will take place within 3 months and provider evaluated by the end of the quarter. If no progress is made, PSI Kenya will then communicate in writing, the intention to drop the provider out of the network.

5. If there is no remedial action to make sure the provider meets the issues at hand, or the provider does not want to be in the network, a letter will be written to the Provider by the HSD Deputy Director explaining that they are no longer in the Network and the reasons why