

## Case Study:

# Pharmaceutical Company — Sales Training Redesign

The services described in this case study were performed by RWD, now GP Strategies Corporation.

### At A Glance:

- Total number of employees – 60,000
- Transformation of Current Sales Training Approach
- Training delivery model from 70% onsite/30% virtual to 30% onsite/70% virtual
- Training Program Components:
  - Role Excellence Profiles
  - Learning and Performance Framework
  - New Curriculum in a Virtual Environment
  - Electronic Field Coaching Form
  - Complete visibility of the program throughout the entire Sales Specialist's Lifecycle

### Results:

#### Impact on the Team

- Onboarding time spent on job relevant skills training was increased by 68%
- Time to field readiness for New Hires was reduced
- New Hires' time to Core proficiency has been reduced by 4-6 months
- Tenured Sales Specialists now have an ongoing way to develop themselves
- Sales Managers now embrace the Field Coaching Form

#### Impact on the Learning Organization

- The learning organization is able to ramp up more quickly
- Employee engagement has been energized
- Trainer development opportunities have increased
- Training delivery costs were reduced by a significant percentage
- Learning time has been optimized by reducing travel
- Work/life balance for New Hires has been enhanced

“We will lead the organization through learning.”

— Senior Director of Sales Learning

### The Challenge: More With Less

The past year provided significantly increasing challenges in the marketplace for pharmaceutical companies and their field sales personnel. Challenges included:

- Decreasing amounts of time that a prescriber is able to spend with a sales representative, due to increasing volumes of patients
- Changes in the Managed Care environment that alter the prescribers' ability to make individual decisions on what drug they will prescribe
- A dynamically evolving payer landscape, requiring sales representatives to increase awareness of marketplace challenges facing health care prescribers
- Increased competition from competitor products and generic forms of popular drugs, increasing the cost-sensitivity of prescribers and patients
- Increasing regulations shaping the nature of interactions and conversations that a Sales Specialist can have with prescribers

These challenges made it increasingly difficult for Sales Specialists to have meaningful interactions with health care prescribers and to differentiate themselves and their products. In addition to marketplace challenges faced by the Sales Specialist, the learning organization faced its own challenges, including:

- Restrictions on spending, putting pressure on what was a traditional multi-week, face to face learning environment for New Hires
- Rapidly changing learning requirements, as frequent demands for new information and new selling skills became the new normal

This leading pharmaceutical company has long been recognized as having one of the best New Hire sales force training programs in the industry. The training predominantly focused on helping sales representatives to understand the details of their products and the diseases for which they are indicated, and how to describe those products to prescribers. The company recognized that in order to build on that organizational tradition of training expertise and stay ahead of evolving marketplace challenges, they needed to transform their sales training approach.

### A Performance-Based Strategy: From Great to Greater (and Faster)

The learning team realized that within these marketplace and organizational challenges was an opportunity to broaden the training focus beyond clinical excellence. The team set out to transform the traditional training program to a performance-based learning organization.

- The performance-based strategy expanded this focus to the full spectrum of what makes Sales Specialists successful and on the entire Sales Specialist work force, not just New Hire training. It addressed the following objectives:
- Base training on work context and outcomes to capture the full spectrum of what makes the best Sales Specialists successful and use that as the backbone of the program
- Help raise the level of each person's performance by providing training and support targeted at individual needs given their current expertise
- Provide a more flexible approach to training and support capable of delivering a greater variety of inputs closer to the time of need by rebalancing the delivery mix from 70% onsite to 70% virtual

- Make learning a continuous on-the-job process by increasing the involvement of Sales Managers and bringing their experience to bear where it's most needed in helping Sales Specialists achieve optimum performance
- Enable faster deployment of dynamic information by increasing the leveraging of technology to support Sales Specialists in their training life cycle
- Provide a framework that supports new product launches as well as ongoing individual skill development
- Help provide a consistent and compliant customer interaction experience by creating multiple touch points that reinforce the company's compliance and regulatory processes
- Provide a flexible framework, capable of supporting a class size of one so New Hires can be on-boarded at any time the need dictates without waiting for a larger training wave to be assembled
- Recognize the needs of a new generation of learners without losing sight of the needs of other generations..

Integrating learning and support into the day-to-day routines that new learners are used to makes learning a seamless part of the way work is done.

### Defining Sales Specialist Success

In order to define what makes the best Sales Specialist successful, the first step was to capture what makes the very best performers excel at what they do. This would form the backbone of what would become the Sales Specialist Learning and Performance Program. Through extensive interviews with top performers, a profile of excellence was developed called the Role Excellence Profile (REP). The REP captures the outputs that Sales Specialists create that are of highest value to the business. This performance-based approach goes beyond defining competencies and the traditional task analysis that captures everything the expert knows and does. The REP approach focuses on what Sales Specialist must "produce" in terms of outputs of value. This approach results in a leaner and more efficient model of performance as it cuts through the noise that populates so many training programs. The REP also captures the criteria that are used to assess the output and the tasks required to produce that output.

### Design a Learning and Performance Framework

The next step was to use the REP to design the new learning components and integrate them with existing training components in a Learning and Performance Framework. This framework defined what elements should be learning vs. performance support, how courses should be sequenced and where the Sales Manager would be involved to ensure “pull through” of learning to on-the-job application. The three main REP outputs of value became the three main courses of the curriculum and the tasks required to produce the outputs became the modules in the courses. During design it became clear that there were ‘Core’ components and ‘Advanced’ components for both for New Hires and Tenured sales representatives, and the curriculum was developed accordingly.

### Build the courses for a virtual delivery model

The company’s goal was to flip its training delivery model from 70% onsite/30% virtual to 30% onsite/70% virtual. Most of the new components were designed for both self-paced and virtual live delivery. At the same time, existing courses were transformed to virtual delivery format.

They have a state-of-the-art simulation facility at its headquarters. This is a collection of recreated doctors’ offices and clinics designed to allow New Hires to immerse in a “real” environment, where they practice selling just as they will in their jobs. For the Advanced curriculum, virtual simulation opportunities were designed, allowing Tenured Sales Specialists to also practice new skills without having to travel back to headquarters.

### Engage Sales Managers

To ensure that the REP and outputs of value became woven into the way Sales Specialists perform, the outputs and criteria for assessing them were built into an electronic Field Coaching Form. This form is used by Sales Managers every time they “ride along” with their Sales Specialists so they can observe Sales Specialist performance in each of the three key areas. A Field Coaching Guide was provided to give Sales Managers tips on what to look for, questions to ask and guidance on what to do based on what they found. This guidance includes pointers to the individual assets in the curriculum.

### Integrate the program throughout the Sales Specialist life cycle

The outputs of value from the REP were also incorporated into job descriptions and New Hire job postings. Combined with the new curriculum and field coaching form, all the aspects of a Sales Specialist’s life within the company are linked. The three outputs of value the Sales Specialist is hired to produce are the same things they are trained to do and the same things they are assessed on in the field. This linkage fosters clarity and confidence in the Sales Specialist, assuring them that everything that are asked to learn has a purpose—to make them as successful as the best.

## Ultimate Impact

### Impact on the Team

- By targeting the Learning and Performance Program to the REP, the percentage of onboarding time spent on job relevant skills training was increased by 68%
- At the same time, the time to field readiness for New Hires was reduced
- Early feedback indicates that New Hires’ time to Core proficiency has been reduced by 4-6 months
- Tenured Sales Specialists now have an ongoing way to develop themselves by enhancing their skills, increasing both competence and engagement
- Sales Managers now embrace the Field Coaching Form as a development tool rather than an assessment tool

### Impact on the Learning Organization

- The learning organization is able to ramp up more quickly to provide new product or sales information
- Employee engagement has been energized
- Trainer development opportunities have increased (able to practice leadership skills by coaching learners over time instead of one-and-done training events with learners)
- Training delivery costs were reduced by a significant percentage
- Learning time has been optimized by reducing travel
- Work/life balance for New Hires has been enhanced, allowing them to spend almost all of their training period at home with their families

The tenacity required to achieve this leading pharmaceutical company's organizational transformation to a performance-based model cannot be overstated. The performance-driven Role Excellence Profile (REP) approach was new to them and required significant socialization. The result is an organization that is seamlessly moving in a new direction, one that is lifting and accelerating the level of performance of all Sales Specialists to more closely align with the performance of the best.

### About GP Strategies

Founded in 1966, GP Strategies is a global performance improvement solutions provider of sales and technical training, e-learning solutions, management consulting and engineering services. GP Strategies' solutions improve the effectiveness of organizations by delivering innovative and superior training, consulting and business improvement services, customized to meet the specific needs of its clients.

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