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Successful Contracting and Objective Setting:

Essential Start-Up Tips for New Medical Sales Managers

by Allan M Mackintosh, BSc, FInstSMM, DipCM

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Allan Mackintosh, a Training and Development Professional with over 23 years of experience in the pharmaceutical industry, outlines the essential aspects of a productive and motivational field visit for medical sales managers and representatives.

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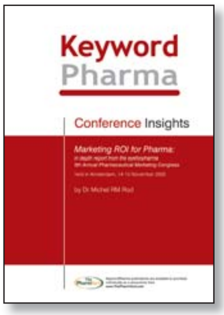

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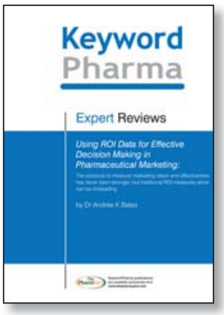

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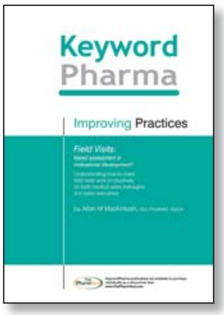

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Successful Contracting and Objective Setting:

Essential Start-Up Tips for New Medical Sales Managers

Allan M Mackintosh

Executive summary

New medical sales managers often struggle to make an impact in their role due to lack of support from senior managers who tend not to hold regular one-to-one coaching sessions. A good senior manager will ensure that a 'contract' is created between themselves and the new sales manager, and that this contract is two-way, with equal 'air-time' for both parties. Unfortunately, this rarely happens. Often, when expectations are not laid out up front, with both parties unaware of each other's needs and expectations, the end result is a mutual lack of trust and respect that leads inevitably to conflict.

The key to avoiding such conflict lies in a combination of learning about behavioural styles, contracting a relationship to enable the management of expectations and establishing a continuous programme of feedback between both parties.

Success for the new sales manager depends upon having a full understanding of what the role entails and its specific objectives. Many senior managers are not comfortable in setting specific objectives, and this can lead to confusion, poor performance and demotivation. In addition, success depends on how the sales manager manages his/her own team – engaging with the team, agreeing their objectives and managing their expectations.

This *Improving Practices* review looks at the people skills required for new medical sales managers to enable them to build successful relationships with their bosses and with their team. It also looks at the important art of agreeing objectives, and how to engage team members in order to help achieve them.

Contents

Introduction

Becoming a medical sales manager can be a fairly stressful experience, particularly if the induction process is not as good as it should be. Unfortunately, all too often, new managers are simply thrown into their new roles, the expectation of senior managers being that they have promoted the new manager on the basis that they can 'hit the ground running.' In many cases, this is just not the case as there is often a huge difference in their new role compared with the one they have just left.

Also, if there is an induction course, many tend to concentrate solely on various processes such as reporting systems, budget monitoring, employment law and, perhaps, disciplinary procedures. Although these processes are important, unless the skills surrounding the leadership of people and teams are addressed then these processes cannot be implemented effectively. People skills tend to be left until a course is put in place some time in the future, perhaps even months (in my case, years!), down the line of a management development programme. By that time, the new manager's lack of leadership and people-influencing skills may have led to unnecessary challenges and upsets.

So, for a new medical sales manager who has been thrown in at the deep end, this review will enable them to get up to speed as quickly as possible on the people skills side. In the process, the expectations of the senior manager can be managed effectively and the new manager will gain the confidence to start their new career in sales management.

There are, I believe, three key things that a new manager must do in order to give themselves the best possible chance of an effective running start in management. These are:

1. Managing the senior manager's expectations.
2. Understanding and agreeing to your own specific business objectives.
3. Engaging your team, agreeing their objectives and managing their expectations in relation to how you are going to work with them.

If the new medical sales manager can tackle these three areas quickly and effectively then the chances of him/her becoming effective managers quickly are increased.

Allan Mackintosh
April 2006

About the author

Allan Mackintosh is a Training and Development Professional with over 24 years of experience in industry. The years he spent in the pharmaceutical industry have given him experience as a sales executive, sales manager, sales coach and trainer. He latterly spent 6 years working as a Manager/Development Coach with GlaxoWellcome and GlaxoSmithKline, before branching out to form his own management coaching business in 2001. His last industry role involved coaching top-flight sales executives, first-line and senior managers, and providing support to enable them to identify and achieve their business objectives. Particular emphasis was placed on supporting new managers who had been promoted to management from the sales function.

In May 2001, Allan founded Performance Management Coaching Scotland to promote the skill of coaching in management, and to enable and support managers to become great coaches in the workplace. Since starting Performance Management Coaching, Allan has steadily grown 'The Coaching Manager' brand and it now covers a book and three unique coaching models, in addition to an e-zine, e-book and several structured courses; details are available from his website www.pmcscotland.com

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Successful Contracting and Objective Setting:

Essential Start-Up Tips for New Medical Sales Managers

Managing the senior manager's expectations

Many people believe that the main reason for many sales managers leaving an organisation is that of the lure of greater financial gain. In fact, the main reason why sales managers leave organisations is that their role no longer offers any challenge or excitement. The second most common reason is the behaviour and capability of their immediate senior manager. More often than not, the two are strongly linked, with the senior manager taking little interest in the sales manager's development, and the sales manager feeling undervalued and bored. Many new sales managers struggle to make a good impact in their role due to lack of support from senior managers who tend not to have regular one-to-one coaching sessions with their sales managers.

Often the blame is laid at the senior manager's door because of this apparent lack of attention, but the sales manager must also take a share of the responsibility. The trouble usually arises when expectations are not laid out up front, with both parties remaining unaware of each other's needs, motivations and expectations. The end result is often a mutual lack of trust and respect, which leads inevitably to conflict. A good senior manager will ensure that a 'contract' is created between themselves and the sales manager, and that this contract is two-way, with equal 'air-time' for both parties. Unfortunately, this rarely happens, and if any contract is put in place it is often only one-way, with the senior manager outlining what he or she expects from the sales manager, with no feedback the other way. This is the result of the 'I am the boss' mindset of many senior managers who fail to realise that by simply asking the question "What do you expect of me?" they can actually get an insight into a new sales manager's style and motivations, not to mention what their actual expectations are. The new manager will also feel valued as a result of the two-way conversation.

A good senior manager will ensure that a 'contract' is created between themselves and the sales manager, and that this contract is two-way

So, how can the new sales manager avoid this conflict and start to work productively with their senior manager? Relationships between sales managers and senior managers that have deteriorated usually do so because there was little trust in the first place and, as a result, openness was not achieved. Here are five tips for avoiding conflict and building trust. Follow these and you will go a long way to ensuring a lasting and productive relationship with your senior manager.

Tip 1: Learn about people behavioural styles

First, find out what your own behavioural style is and then what your senior manager's may be. Compare the two, identify any differences and then work on these differences by matching your manager's body language very discreetly. Discreetly, try to match their tone and volume of voice, being careful not to mimic. Observe and copy their eye and body movements. When you start to match their body language you will find that they start to match yours. This is the beginning of the rapport-building process and it goes a long way to starting to build trust.

There is more about behavioural styles later in this review. I make no apology for information on behavioural styles appearing in other reviews I have had published, they are very important!

Tip 2: Contract with your manager

Contract with your manager by getting agreement about how best the two of you are going to work together. Ask questions such as:

- "What are your specific expectations of me as a sales manager?"
- "What are my specific objectives and how am I going to be measured?"
- "What behaviours annoy you?"
- "What motivates and demotivates you?"
- "What reports do you want? When do you want them? What content?"
- "How often do you want to sit down one-to-one with me?"

Contracting is all about managing both parties' expectations. A good senior manager will always outline his or her expectations and will ask you about yours. Once you are both clear about what each other's expectations are, then this is another building block in the foundations of trust and respect.

> *A good senior manager will always outline his or her expectations and will ask you about yours*

One of the hardest lessons I learned was when I did not contract with a senior manager. We had completely opposite behavioural styles, which meant that we didn't get off to the best start. He thought I was too energetic, flighty and too much of a risk taker; I thought he was too focused on detail, had no personality and was constantly stuck in front of spreadsheets. We were forever in conflict: he asked me for reports that I could see no reason for; I was frustrated when he ignored my pleas for a greater training budget and the chance to redesign various marketing pieces to reflect the local marketplace needs. If we had contracted at the start of our relationship and discussed our similarities and differences, and how best to work with them, we may not have had the conflict that we did. The result of this personality clash was that there was little trust and respect between us, and very little communication. Meetings between the two of us were, to say the least, fraught! As the tension within our organisation increased, the barriers between myself and this senior manager grew to a stage where the working relationship had totally disintegrated. It was not a pleasant situation for either of us! If I knew then what I know now about contracting then perhaps it might have been a more pleasant and productive relationship.

There is more about the actual process of contracting later in this review.

Tip 3: Ask for regular feedback

Ask for regular feedback on how you are progressing in your new role. Ask your senior manager to meet regularly with you and to coach you when needed. Be proactive and do not wait for your senior manager to come to you. However, do not always be seen to be reliant on your senior manager and give them space. Agree this area of support in your contract. See if you can set a regular monthly or bimonthly meet where you can take them through your progress against the objectives that you have previously agreed. I would hope that all senior managers would do this proactively, but in some cases you may really have to push for these coaching meetings.

> *Ask for regular feedback on how you are progressing in your new role*

Tip 4: Be seen to be a support for your senior manager

Management can be lonely and stressful, particularly if the manager isn't managing their own boss particularly well or if the company and/or team results are not doing as well as expected. Be supportive and offer to take on extra tasks provided you have the time and capability to do so. These tasks will not only make space for the senior manager to work more productively and strategically, they will also enable you to develop your own capabilities. Be careful to ensure you manage your team-mates' expectations here too. Being seen as supporting the senior manager can often be misinterpreted by your colleagues and, on occasion, other, less enlightened sales managers can see this behaviour as threatening.

> *Be supportive and offer to take on extra tasks provided you have the time and capability to do so*

Tip 5: Go with your instincts!

If you feel that the relationship with your senior manager is starting to go sour, then immediately call a meeting and openly discuss your feelings. To make this easier than it may sound, again build it into your contract right at the start. Say something along the lines of "If I feel our relationship is not what it should be, can I address it immediately as opposed to letting it linger?" Do not, where possible, discuss your feelings with your peers within your own management team. You will find some people very supportive and helpful, but you may also find that some may go out of their way to reinforce the feelings you have, thereby making it more difficult to address these with your manager. It is always best to tackle these feelings head on without referring to your team mates. If you have a coach allocated to you within your organisation, he/she is often the best people to enable and support you to handle these situations.

Understanding and agreeing to specific business objectives

It is absolutely vital that you have a full understanding of what your specific role entails and what your specific objectives are in relation to that role. Without

C	– Challenging
S	– Specific
M	– Measurable
A	– Achievable
R	– Relevant
T	– Timescale

Table 1. The C-SMART process for objectives.[1]

full understanding, confusion can occur and this can lead to both a lack of success and a breakdown in the relationships with your senior manager and your team.

It is absolutely vital that you have a full understanding of what your specific role entails and what your specific objectives are in relation to that role

In the initial meetings where you contract with your senior manager, ensure that you get clarity on what your specific objectives are. Many senior managers are still not comfortable in setting specific objectives, tending more to generalise and give 'top-line' objectives. This is dangerous and can often lead to confusion, resulting not only in poor performance but in demotivation.

The best structure I have found (and it tends to be the most common) is the C-SMART[1] process for objectives (Table 1). Each of your objectives should fit into the C-SMART process. Only this way will you be able to plan your workload and your priorities effectively and fully. Remember also that, as the sales manager, you have to lead the way with the people who report to you, and that you also have to go through the process of objective setting with your team. There is more information on objective setting later in this review.

Engaging the team, agreeing their objectives and managing their expectations in relation to how you are going to work with them

To get off to the best possible start in management, the third priority is to ensure you get the 'buy-in' of the team that you are managing.

Building rapport

The first essential step is, as with your senior manager, building the all-important rapport that is the 'stepping stone' to awareness, trust and respect.

It is important that any manager has a good understanding of behavioural or personality styles so that they can flex their own style to build rapport with their employees and team. Flexing one's style can, under certain conditions, be difficult and tiresome; for example, in the case of dealing with stress. It is vital, though, that a manager leads the way and maintains rapport with employees at all times. I have seen too many managers refuse to change their style because their ego tells them that, since they are the boss, the employees should be flexing towards their style. The result is usually a personality clash and perhaps you can guess who stands to lose the most in that situation. However, if employees have the same knowledge of behavioural styles as the manager does, they can learn to flex and accommodate too, especially with their own team, colleagues and customers. This will make it easier for everyone involved.

The first essential step is, as with your senior manager, building the all-important rapport that is the 'stepping stone' to awareness, trust and respect

What are these behavioural styles how do you identify them, and how do you adapt your style to that of other people? There are numerous models of behavioural styles and they are all based on work done in the 1920s by the psychologist Carl Jung. It would be beneficial for you to read more about his work as well as familiarise yourself with models, such as the Myers–Briggs Type Inventory[2] and the DiSC (Dominant, Influencing, Steady, Cautious) Personality Type.[3]

The four behavioural styles

There has been a lot of research on behavioural style, producing many models, but they are all very similar. The model I will introduce you to was developed by Wilson Learning in the USA.[4] It is the one I have used most in my career, and I find it works well. I also like the work of Dr Michael Lillibridge entitled *The People Map*[5] because it uses up-to-date and corporate language.

Both the Wilson Learning and Lillibridge models suggest that there are four distinct behavioural types. For each of us, our behavioural style can be viewed as our personal comfort zone, or the style we adopt most naturally when not under stress. Labels are used to identify these four behavioural styles; however, they are only labels. It is most important to be aware of the characteristics of each, and not the definition of the word itself. It is also important to note that there will be some crossover in almost everyone; therefore there are no absolutes. Some characteristics will be far more prominent in some people's normal behaviour than in others.

Behavioural style body language	**Driver, controlling *or* leadership style**	**Analytical, processing *or* task style**	**People, amiable *or* supporting style**	**Free spirit, expressive *or* enthusing style**
Facial expression	Fixed	Fixed	Varied	Varied
Eye contact	Intense Long duration	Reflective	Empathetic	Intense Short duration Scattered
Posture	Formal	Formal	Informal	Informal
Body movement	Limited	Limited	More mobility	More mobility
Gesture size/frequency	Small/high	Small/low	Larger/low	Larger/high
Voice tone	Monotone	Monotone	Inflexion	Inflexion
Speed	Fast, clipped	Slow, measured	Slow, measured	Fast
Volume/force	Louder	Softer	Softer	Louder
Decision making	Quick Limited facts	Slower Lots of facts	Slower Lots of opinions	Fast Intuition

Table 2. Identifying the four behavioural styles using body language.

Table 2 provides a quick reference for identifying these styles using body language and tips for building rapport with each of these personality types are given in Table 3. Knowing your own style and the styles of the people you manage can help you to build rapport by leading the way and flexing your style. This will help also in managing your senior manager!

Behavioural style 1 – driver, controlling or leadership style: People who fit into this category are business-like and formal in appearance. Their main priority is the task at hand, and the results achieved. Their pace is fast and decisive. They prefer an atmosphere in which they can control people and processes, and achieve acceptance through their productivity and competitiveness. *Drivers* like to be in charge, seek productivity and dislike loss of control. They want you to get to the point, because they are irritated by inefficiency and indecision. They measure their personal worth by the results they achieve, and their track record. Under pressure these people will assert themselves strongly, and dictate the way things are going to be; they are autocratic.

> *Drivers* like to be in charge, seek productivity and dislike loss of control

To influence and work with these people, you need to support their goals and objectives and demonstrate what your ideas will do, when you will put them into practice and what they will cost.

Behavioural style 2 – analytical, processing or task style: People using this style appear somewhat formal and conservative. Their main priority is the job at hand, and the process needed to achieve it. Their pace is measured and systematic. They prefer an atmosphere that encourages careful preparation and achieve acceptance through being correct, logical and thorough. *Analyticals* want recognition for being correct, seek accuracy and dislike embarrassment. They want you to be precise in your dealings with them, because they are irritated by unpredictability and surprises. They measure their personal worth by their degree of precision, accuracy and activity. Under pressure, these people will withdraw into their own world, and avoid contact with causes of stress.

> *Analyticals* want recognition for being correct, seek accuracy and dislike embarrassment

To influence and work with this personality type, you need to support their thinking and show how your ideas will support their personal credibility.

Behavioural style 3 – people, amiable or supporting style: *People style* individuals appear to be casual, but conforming. Their pace is slow and easy. They prefer to maintain relationships and avoid confrontation. Therefore, they prefer an atmosphere that encourages close relationships, and achieve acceptance through conformity and loyalty. They need to be appreciated,

> *People style* individuals appear to be casual, but conforming

Personality type	Avoid	Try to achieve
Driver, controlling or leadership style	• Wasting their time – get down to the matter in hand • Being vague and rambling • Getting too personal or trying to get too close • Being disorganised • Straying from the purpose of the discussion • Asking irrelevant questions • Making wild claims • Trying to control the call • Trying to chit-chat and socialise at length	• Getting down to business quickly • Being specific in questioning • Efficient time use • Providing a few alternatives for them to choose from • Being factual and succinct • Talking about results and outcomes • Avoiding too much detail
Analytical, processing or task style	• Being disorganised and casual • Being late • Providing personal incentives • Pushing or coaxing • Using testimonials or options • Being flippant or gimmicky	• Being well prepared • Getting straight down to business • Listening carefully • Being specific and logical • Being persistent and thorough when questioning • Being formal and unemotional when challenging • Giving them time to put in their point of view
People, amiable or supporting style	• Going straight into your discussion without an element of socialising • Keeping the discussion subject focused all the time • Causing them to respond quickly • Dominating or controlling the discussion • Being rapid or abrupt • Keeping offering opinions or increasing the complexity of the decision • Making wild claims • Being very factual	• Being friendly and showing an interest in them personally • Being prepared for some chit-chat and socialising before getting down to business • Taking time to uncover their needs by asking open questions • Being alert for non-verbal cues signifying dissatisfaction or disagreement • Being informal • Presenting your facts and points in a non-threatening way • Including guarantees and assurances wherever possible • Giving your presentation the personal touch
Free spirit, expressive or enthusing style	• Controlling the discussion and keeping strictly to business • Being impatient • Inputting too much detail into the presentation • Tying them down there and then to making decisions • Socialising too much • Patronising or digging your heels in	• Some element of socialising before the business but not too much • Talking about opinions and other people • Outline your ideas about what is being discussed • Being enthusiastic and energetic • Being fast paced • Offering incentives

Table 3. Tips for building rapport with the four personality types.

seek attention and try to avoid confrontation. They want to be pleasant because they are irritated by insensitivity and impatience. They measure their personal worth by their degree of compatibility with others, and the depth of their relationships. Under pressure, people who have this behavioural style will submit or acquiesce.

In order to influence and work with such people, their managers need to support their feelings and show how their ideas will support their personal circumstances.

Behavioural style 4 – free spirit, expressive or enthusing style: *Free spirit style* personalities appear to be more flamboyant. They have a tendency to interact within relationships and they dislike any loss of prestige. Their pace is fast and spontaneous.

> *Free spirit style personalities appear to be more flamboyant*

They try to create an atmosphere that encourages flexibility. They achieve acceptance through sociability and in creating a stimulating environment. They want to be admired, seek recognition and dislike being ignored. They want you to be stimulating because they are irritated by routine and boredom. They measure their personal worth by the amount of recognition and acknowledgement (or complaints) they receive. Under pressure, a free style behavioural type person will become offensive or sarcastic.

Managers who want to be successful in influencing and working with a person who uses this style will need to support their dreams and ideas, and show how they can help enhance their standing with others.

Contracting

As mentioned earlier in this review, an essential step to getting this 'buy-in' is establishing a sound and agreed contract between you as sales manager and members of the team reporting to you. Just as you did with your senior manager, a contract in this context is simply an agreement between yourself and the reporting sales executive as to how best you are going to work together. It is a chance for each party to outline expectations, hopes and fears, and is a superb opportunity for both sales manager and sales executive to fully understand each other in terms of personality style, motivators and demotivators. It is also an opportunity for the sales manager to ensure that the sales executive fully understands their role and their responsibilities as well as their specific objectives.

So, how does contracting work? Contracting should start right at the beginning of a manager–sales executive relationship. You should meet with the sales executive, both having prepared a list of aims for the meeting. Table 4 gives examples of possible aims for both the sales manager and the sales executive during a first contracting meeting.

In reality, how many of these aims will actually be realised in a first meeting? Our culture is still very much based on the hierarchy in which a manager tells the sales executive what to do. It is very easy for the meeting to be very one way, with the manager doing a lot of talking and outlining what is expected of the sales executive both in terms of the company regulations and the sales executive's activity and sales targets. In this situation, the sales manager is missing a tremendous opportunity to get to understand the sales executive's personality, not to mention his/her strengths and development areas. The chances are also high that the sales executive will sit back and listen as opposed to being proactive and outlining exactly what they need to know and whatever else is going on in their head! As a result there is the danger of not getting the best out of the sales executive. Asking questions and listening to the answers will not only reveal more about the sales executive in terms of his/her capabilities and understanding, but will also start to make the sales executive feel valued and, as a result, trust and respect will start to build. This is the basis for a productive relationship.

By taking more time in the initial meeting and by employing questioning and listening techniques, you as manager can establish a quick rapport and also start to understand exactly what makes the sales executive 'tick'. In the process you will learn how to ensure constant motivation in your salespeople. Too many managers still do not know, even after working with some of their salespeople for some time, specifically what motivates and demotivates each individual. Many managers will claim they know, but when you ask them to outline what each of their sales executives' primary intangible needs are, you almost inevitably get the 'silent stare'!

> *Contracting is a vital skill that needs to be two-way, ensuring that both manager and sales executive get the opportunity to talk and to understand each other*

Clearly, contracting is a vital skill that needs to be two-way, ensuring that both manager and sales executive get the opportunity to talk and to understand each other. It is not just about outlining roles, responsibilities, rules, objectives and measures; it is about listening, understanding and building rapport, trust and respect. The meeting needs time and depth. A quick telephone call is totally inadequate – the meeting must be face to face.

Too many managers do not spend enough time with their salespeople in the initial stages of the relationship and even when they do spend time it can tend to be

For the sales manager	For the sales executive
• To ensure that the sales executive feels welcomed and part of the team • To ensure that the sales executive understands their role and responsibilities • To ensure that the sales executive knows what the team/company rules and regulations are • To ensure that the sales executive knows what their sales and activity targets are and how they are going to be measured • To outline the manager's expectations of the sales executive in terms of behaviour, attendance, personal qualities, etc. • To explain what management style the manager has and what motivates and demotivates them • To understand what motivates and demotivates the sales executive • To begin to understand the sales executive's personality styles and preferences • To agree what support the manager is going to provide in relation to the sales executive's progress and development • To agree a communication process	• To fully understand how the manager likes to operate • To understand exactly what the role requirements are in terms of responsibilities, objectives and measures • To understand any administration procedures such as e-mail, expenses, etc. • To know a bit more about the team and culture • To understand any team rules, responsibilities and meeting dates • To address any hopes and fears that they may have • To understand how best the manager is going to support the sales executive • What does the sales executive do if they need help?

Table 4. Examples of possible aims for the sales manager and the sales executive for a first contracting meeting.

very much one way. The manager then runs the risk of not understanding, and of stifling opinion, creativity and innovation, as well as potentially causing frustration and subsequent demotivation. This is inadequate performance management.

Objective setting

Just as it is vital that a sales manager meets with his/her senior manager and agrees and understands the sales manager's specific objectives, it is just as vital for the sales manager to sit down with each of his/her team to do the same.

As their manager, you must first ensure that each of your team knows specifically what his/her role purpose is. In the case of a sales executive, the purpose of his/her role is to ensure that the sales of the products that person is responsible for achieve or exceed their agreed targets. Within this general role purpose, you should outline the various 'performance areas' that constitute the role. For a sales executive, these could be areas that cover the following:

- Sales – amount of product sold versus agreed target.
- Activity – the number of calls achieved per target customer group versus agreed target. This could be a mixture of face-to-face calls, meetings, exhibitions, etc.
- Budgets – are marketing, customer or public relations budgets being utilised effectively and kept within an agreed amount?
- Projects – how the sales executive performs while working on set projects.

It may be that each of these areas is 'weighted', in that each performance area will have a certain level of importance in relation to the overall business. In my experience, Sales usually has the greatest weighting (anything from 50% to 90%) and Projects have the least.

Performance areas are really only 'groupings' of what are collectively termed objectives. It is these objectives that the sales executive should focus on, and the objectives should be structured in such a way as to ensure that what has to be achieved is clearly understood.

As a manager, you must take time to ensure that every objective follows the C-SMART guidelines (see Table 1). Only in this way will clarity and specificity be achieved. Examples of C-SMART objectives in relation to the performance areas for a sales executive are shown in Table 5. These are simplistic, but cover the main responsibilities of the average GP sales executive. It is important that these objectives are set as early in the financial year as possible.

The key to the success of these objectives is to ensure that the sales executive has an input into setting them. Simply dictating the numbers with little or no consultation is weak management and only results in the demotivation of all concerned. Allowing the sales executive an input ensures ownership of the objectives. As the manager you must then review how the sales executive is progressing against their objectives on a regular basis, both informally on field visits and formally

Performance area	Objectives	Measures	Timescales
Sales	To achieve 100% of target for product X	Monthly sales	Quarterly
	To achieve 100% of target for product Y	Monthly sales	Quarterly
	To achieve 100% of target for product Z	Monthly sales	Quarterly
Activity	To achieve agreed target of GPs – 1:1	Weekly reports	Quarterly
	To achieve agreed target of GPs – meetings	Weekly reports	Quarterly
	To achieve agreed target of GPs – exhibitions	Weekly reports	Quarterly
	To achieve agreed target of practice nurses	Weekly reports	Quarterly
Budgets	To achieve ± 5% of marketing budget	Monthly financial reports	Quarterly
	To achieve ± 5% of customer budget	Monthly financial reports	Quarterly
	To achieve ± 5% of exhibition budget	Monthly financial reports	As agreed
Projects	To achieve specific objectives in relation to project plan	As agreed	As agreed

Table 5. Examples of C-SMART objectives in relation to performance areas for a sales executive.

in set review sessions. The latter should preferably take place every quarter, and at the very least twice a year. The sales executive must be motivated to review their progress against the objectives continually, and as sales manager you must take time to challenge and support this progress, ensuring that the sales executive stays on track throughout the year. The aim should be that when it comes to the year end appraisal there are no surprises and that the sales executive has achieved all their agreed objectives. This way, the company hits its targets and both you and the sales executive achieve your bonuses!

Ensure that the sales executive has an input into setting his/her objectives

Any manager who does the year end appraisal following only little informal or formal review of objectives during the year must surely have their own objectives reviewed and, in the case of any objectives relating to reviews, have these marked 'Failed'!

Although we are focusing on the sales function in which, perhaps, the measurement of achievement is easier than in some other functions, such as marketing, manufacturing or medical, the C-SMART process should be adhered to as much as possible regardless of the function that is being worked in. The C-SMART process will ensure greater clarity for any manager and direct report alike and, as such, will aid understanding and thus clarity of purpose.

Conclusion

In this short review I have highlighted the key areas of influencing that a new sales manager needs to address quickly in order to start being effective in their new role. Managing and understanding the senior manager's expectations through the effective use of the skill of contracting is a vital component of success. By utilising the knowledge and skills behind behavioural analysis, you can build relationships and rapport quickly, thus facilitating the process of building trust and respect. Finally, the creation of good, clear work objectives between yourself and your manager and, of course, your team, will help establish a framework and platform for success for everyone.

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Field Visits - Feared Assessment or Motivational Development?

A KeywordPharma **Improving Practices** review by **Allan M Mackintosh** Published January 2006

ThePharmYard product code kwp003 ISBN-13: 978-1-905676-01-9

Allan Mackintosh, a Training and Development Professional with over 23 years of experience in the pharmaceutical industry, outlines the essential aspects of a productive and motivational field visit for medical sales managers and representatives.

Executive summary

Field visits occupy around 80% of a sales manager's time. The benefits to sales executives, managers and organisations in general are significant, yet the value of such visits is often questioned. The key to their success lies in how they are undertaken.

Lack of structure is a major factor in many of the poorest field visits. This leads to an absence of focus and, inevitably, a lack of action and development for the sales executive. This ultimately demotivates both parties. Managers must possess the necessary skills to ensure the field visit structure produces motivation, results and ongoing development.

A manager requires basic skill-sets to conduct effective field visits. The ability to build trust, rapport and respect is an essential ingredient for every good sales manager. The manager also needs to be able to contract the working relationship, to coach and to motivate an employee. Giving constructive and appropriate feedback is critical to the process.

Field visits provide support and advice for sales executives, assessment and relationship-building opportunities for sales management, and improve productivity for organisations.

This review outlines the essential aspects of a productive and motivational field visit.

Contents

About the author

Allan Mackintosh is a Training and Development Professional with over 23 years of experience in industry. The years he spent in the pharmaceutical industry have given him experience as a sales executive, sales manager, sales coach and trainer. He latterly spent 6 years working as a Manager/Development Coach with GlaxoWellcome and GlaxoSmithKline, before branching out to form his own management coaching business in 2001. His last industry role involved coaching top-flight sales executives, first-line and senior managers, and providing support to enable them to identify and achieve their business objectives. Particular emphasis was placed on supporting new managers who had been promoted to management from the sales function.

In May 2001, Allan founded Performance Management Coaching Scotland to promote the skill of coaching in management, and to enable and support managers to become great coaches in the workplace. Since starting Performance Management Coaching, Allan has steadily grown 'The Coaching Manager' brand and it now covers a book and three unique coaching models, in addition to an e-zine, e-book and several structured courses; details are available from his website www.pmcscotland.com

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