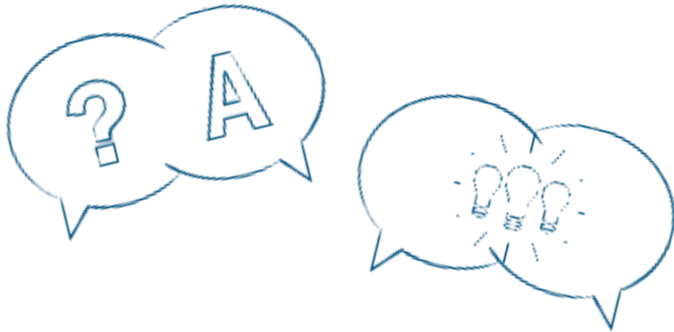
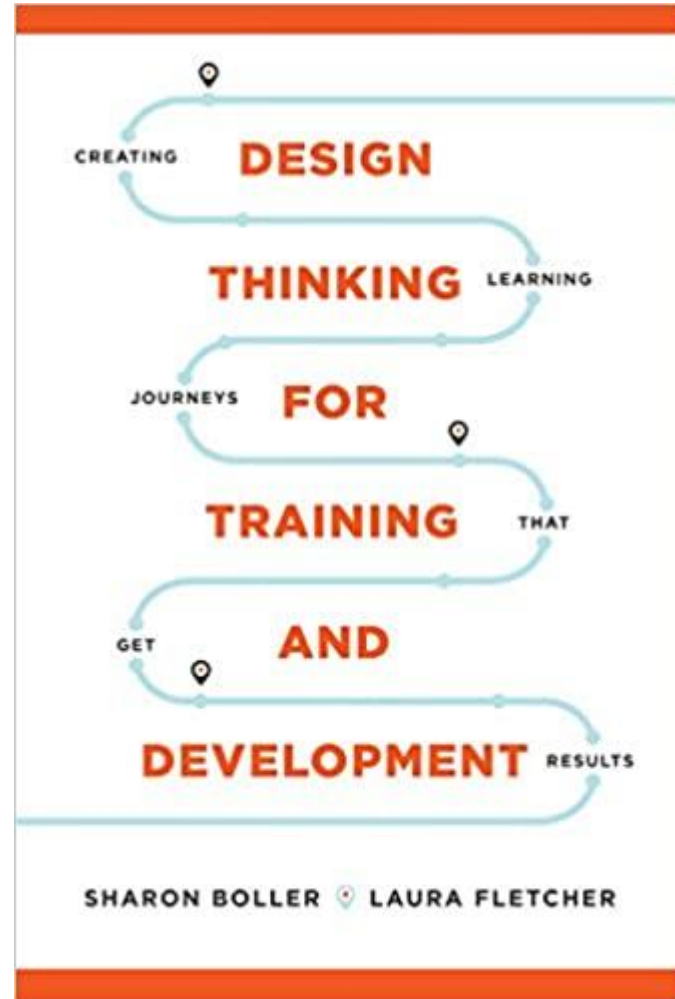


# ATD Book Talk



Thursday, August 27, 2:00 – 3:00 p.m. EDT



# HELLO FROM US!



**Sharon Boller**

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**Laura Fletcher**

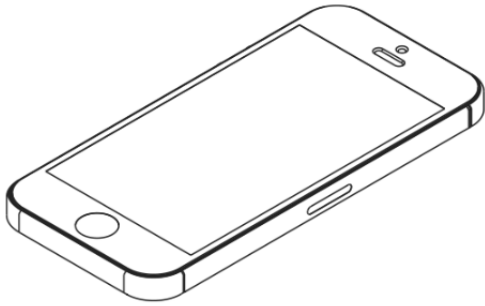
Sr. Program Manager at Salesforce

[lfletcher@salesforce.com](mailto:lfletcher@salesforce.com)

Twitter: @LauraCFletcher



# WHAT'S BROUGHT YOU HERE?



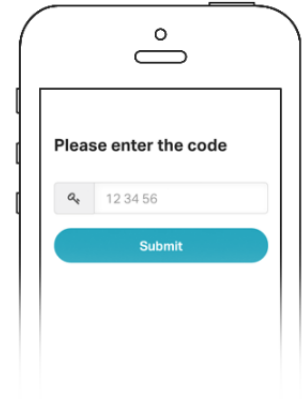
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# OUR PLAN FOR TODAY



**Roughly 30 minutes to overview  
DT and principles from book**



**Roughly 30 minutes answering  
questions, hearing your stories,  
and discussing**

# WHEN YOUR VIEW IS LIMITED



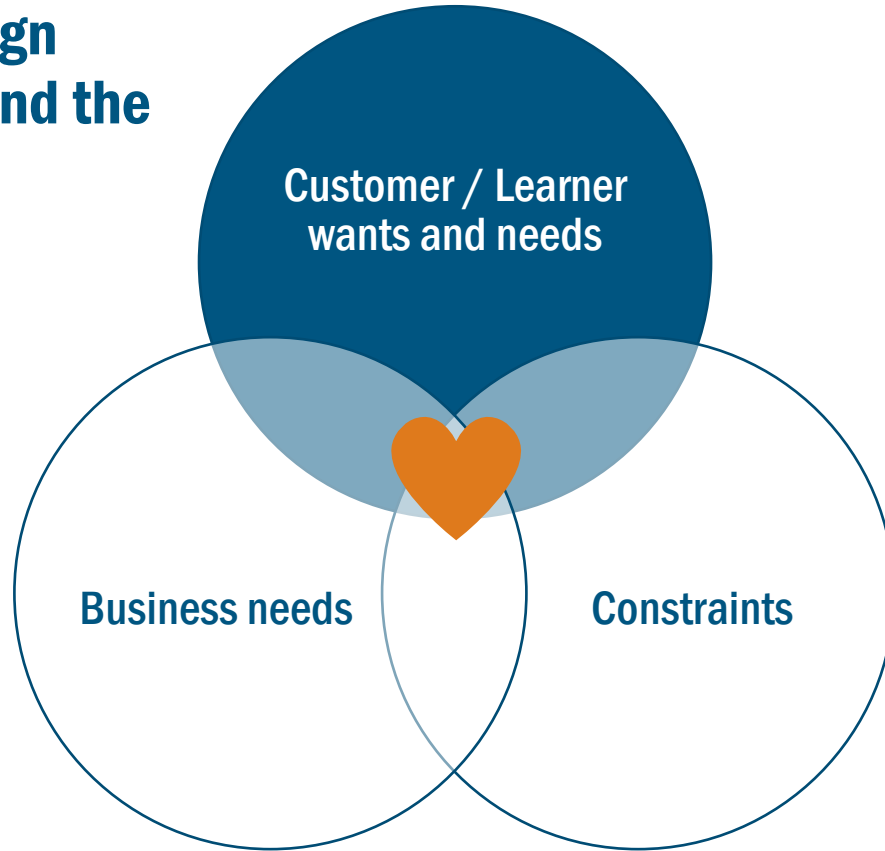
# THE PATH TO MAGIC



# SAME SOLUTION; DIFFERENT *experience*

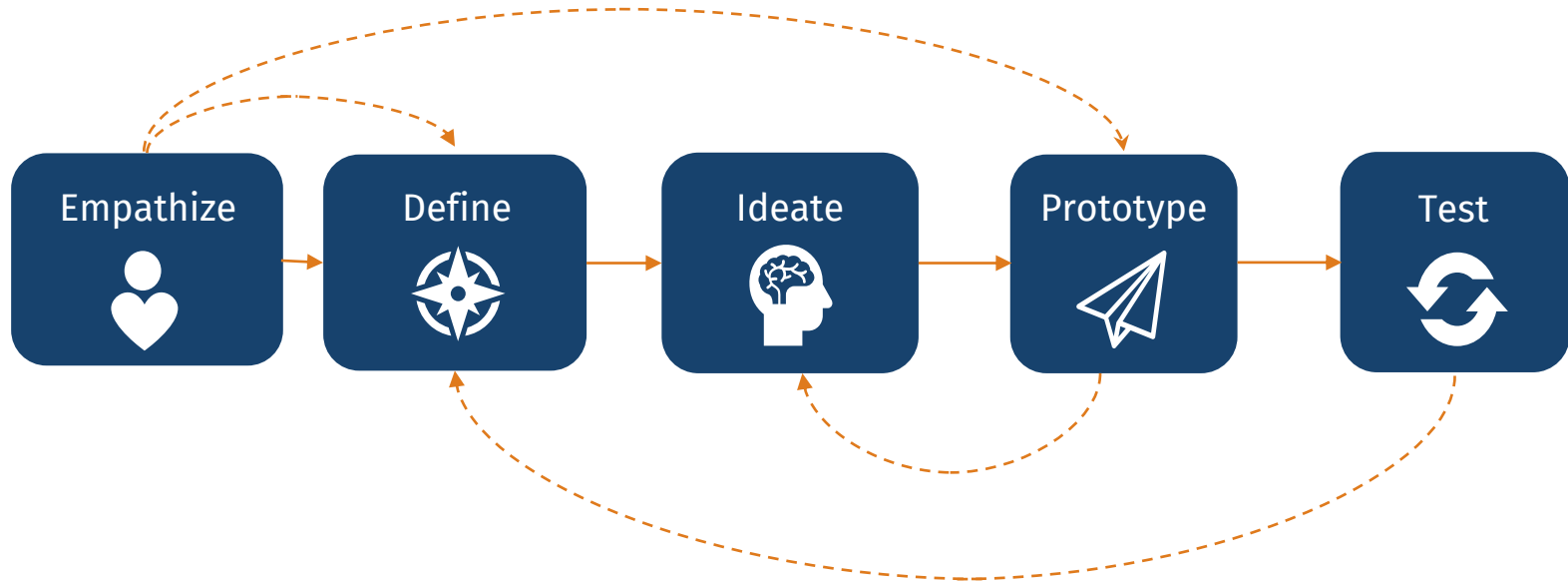


**The aim of Design  
Thinking is to find the  
sweet spot**

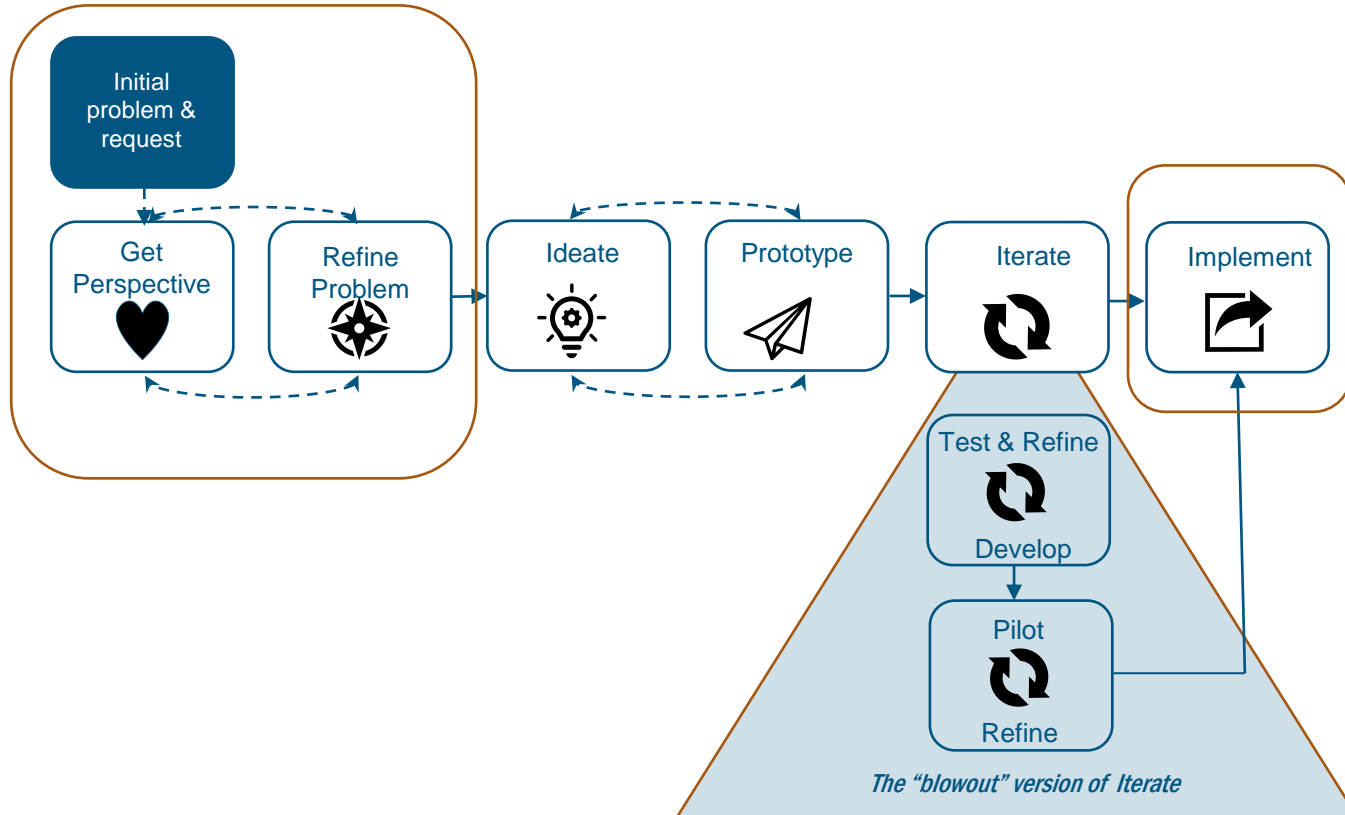




# DESIGN THINKING MODEL...VERY COMPATIBLE WITH ID MODEL



# WE CRAFTED “LXD” FRAMEWORK FROM IT



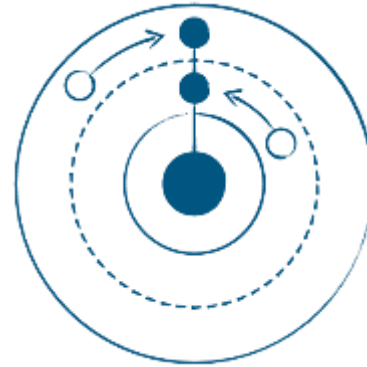
# GUIDING PRINCIPLES



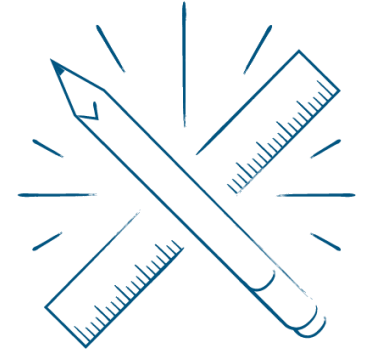
**Recognize learning as  
a journey**



**Get perspective**



**Find – and mind – the  
sweet spot.**



**Prototype before you  
refine**

**WHAT'S USUALLY ASSUMED**

**STAGE 1:**  
Prepare to learn

**WHERE MOST ORGS WANT TO FOCUS**

**STAGE 2:**  
Acquire knowledge or skill

**WHAT'S MOST NEEDED**

**STAGE 3:**  
Build memory and competence

**WHAT'S SELDOM CONSIDERED**

**STAGE 4:**  
Maintain over time

**1. NOTICE**

**2. COMMIT**

**3. LEARN**

Do initial practice.

**4. REPEAT AND ELABORATE**

**5. REFLECT AND EXPLORE**

**6. SUSTAIN OVER TIME**

Learner has experience associated with each step.

1. NOTICE

4. REPEAT AND  
ELLABORATE

Experiences influence mindset.

3. LEARN

Do initial practice.

Mindset influences behavior.

Behavior influences outcomes.



Phase	PREPARE		ACQUIRE KNOWLEDGE & SKILL	BUILD MEMORY & TRY USING ON THE JOB		MAINTAIN OVER TIME
Step	1. Notice	2, Commit	3. Learn and Practice	4. Repeat and Elaborate	5. Reflect and Explore	6. Sustain usage
<b>Desired Outcomes</b>	Accept the need to learn	Make time to learn	Engage, find relevance	Remain committed; gain confidence	Go deeper; learn more; share early successes	Consistently use new skill or knowledge; achieve business results
<b>Key actions or activities</b>						
<b>Thoughts &amp; Feelings</b>	↑Intrigued	↑Motivated	↑Curious, immersed	↑Committed	↑Confident	↑Supported
	↓Dismayed	↓Resistant	↓Bored, overwhelmed; disinterested	↓Disengaged	↓Discouraged; desire to avoid use.	↓Cynical
<b>Magical Moments</b>						
<b>Miserable Moments</b>						

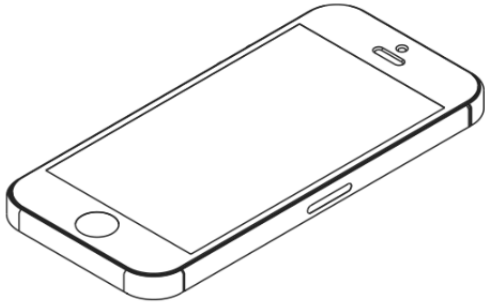
**MAXIMIZE** *magical.*



**AVOID** *miserable.*



# MAGICAL AND MISERABLE?



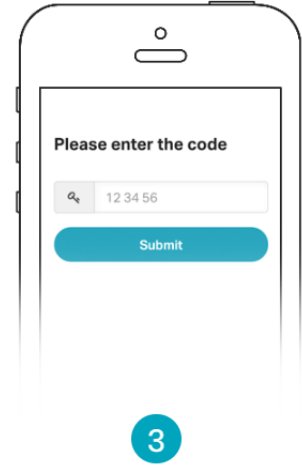
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**Tools to Help**  
**Some we share in the book**

## Challenges or Opportunities

What problems are we trying to solve, and what obstacles do we need to overcome? Or – what opportunities do we want to harness?

**A strategy blueprint is a  
GREAT discussion tool**

### Aspirations

What are the biggest desired outcomes?  
What does success look like?

### Focus Areas

What should we focus on for the biggest impact?

### Guiding Principles

What mantras will guide efforts?

### Activities

What types of activities solve the problems?

### Outcomes

What metrics gauge success?

# Strategy Blueprint: Design Thinking Roll-Out

## Challenges

What problems are we trying to solve, and what obstacles do we need to overcome?

- Learners absent from design process; we don't know enough about them/their situations.
- Often difficult to get clients to define business outcomes –problem (or opportunity) can be unclear
- SMES driving design rather than learners; too much content going into solutions.
- We struggle to get buy-in on reinforcement and need to plan out solution implementation.
- Right now, IDs own LX; need to get entire project team owning LX from ideation onward
- BLPers hesitant to show unpolished ideas.

## Aspirations

What are the biggest desired outcomes? What does success look like?

- 100% of our designs consider all aspects of learning journey.
- 100% of our designs/solutions created with input from learners.
- We find and mind the sweet spot so it stays top of mind throughout project.
- Clients can share tangible, measurable results w/us that resulted from solution we helped create.

## Focus Areas

What is the scope of the strategy?  
What will you focus on for the biggest impact?

1. Knowledge building /sharing.
2. Tools and processes
3. Evolution in project work: all roles embrace DT
4. Use of DT in internal problem-solving as well as client project work.

## Guiding Principles

What mantras will guide the team's work?

**Principle 1:** Find and MIND the sweet spot.

**Principle 2:** Get perspective.

**Principle 3:** Recognize learning as a journey.

**Principle 4:** Prototype before you refine.

## Activities

What types of activities solve the problems?

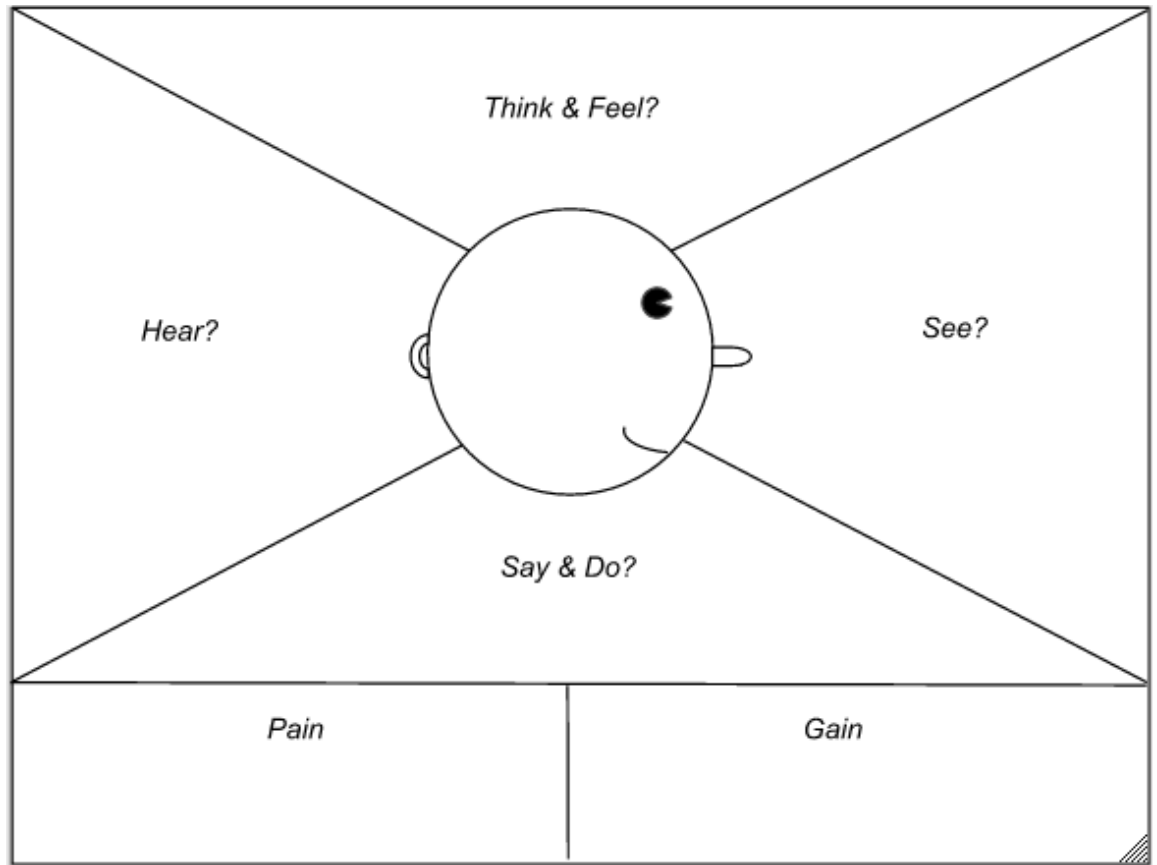
1. **Brainstorm sessions with agile team** on execution of DT across roles and processes.
2. **Revision and updating of processes and tools.**
3. **Skill-builder activities for BLPers:** practice using the tools.
4. **Sr. ldrshp modeling the way;** using DT to solve internal problems.
5. **Application and reinforcement in client work:** sharing success stories and “best practices.”

## Outcomes

Metrics by which we'll measure success include:

- By April 2020, at least 10 projects are worthy of suggesting for Brandon Hall awards and 6 of those would qualify for “gold” Brandon Hall awards that have demonstrable business outcomes.
- By EOY, 2019 100% of projects achieve a “4” rating on BLP quality rubrics

# Empathy Mapping



## Think?

“How am I going to place new indications?”

“What’s right for the patient?”

“How am I going to fit this new message into my call time?”

## See or Hear?

**From doc’s:** – “It works the same as everything else.” “I prescribe your competitor. Works fine, and I don’t see why I should switch.” “I don’t prescribe any new drug for the first 2 years it’s on the market. I want to wait and see how it does.”

**From other reps re: trng:** “That was a total waste of time.” “What just happened...I’m not sure I got it.”

## Pain/Challenges

Time it takes to really learn new stuff and time it takes to get COMFORTABLE with new messaging, tools, content

Nerves: ride-alongs can be intimidating.

Lack of clarity on how to insert new messages into calls.

## Feel?

**Anxious and unconfident** – “I don’t know enough.” “It’s not clear to me how this fits. What if I say the wrong thing in the doc’s office?”

**Excited** – “Will this enable me to cover more indications and sell more scripts?”

**Overwhelmed** – “I thought I understood this...but now I don’t think I do.”



## Do?

Sell on value if the product is innovative or different. Sell on reputation and org, reputation if can’t really differentiate between their product and competitor products.

Focuses on what they CAN say, not what they can’t.

Avoids selling a product if they don’t understand it; relies on what they know/feel comfortable selling. Reverts back to old habits if attempts at selling new don’t immediately pay off.

## Motivators

Hitting sales goals

Helping patients who can benefit from these products

Gaining interest from docs; getting doc to try a drug on a patient.

Peer-to-peer interaction and story-sharing

Ride-alongs – incentive to prepare.

# Persona Creation



***“Show me how to use info within a sales call. Give me reinforcement so I can build confidence.”***

## Sales Call Realities

- Calls range in length from 30 seconds to 4 minutes for a standard call to 7 to 15 minutes of time for a lunch/learn event.
- Lunch events are hard-earned; many times people are primarily interested in free food.
- **Figuring out how to incorporate new messaging into that tight call window is often the hardest part of transferring training to the job.**

## Personal Profile

Reps have been with the company nearly 10 years and have experience in several therapeutic areas. **They pride themselves on hitting or exceeding goals while staying compliant.** It's important not to lose respect with an HCP.

## Challenges

- Getting it all done in a day.
- **Figuring out how to incorporate “new” messaging into existing ones and staying within a 30-second call length.**
- **Building confidence after formal training on new messaging, product, clinical trial info, etc.**

## Values

- Having solutions to sell HCPs
- Being a credible voice to HCP
- Working for a company whose reputation is solid.
- **Hitting goals and maximizing income.**
- **Helping patients who can benefit from the products**

## A Day in the Life

Days are long. The work day starts at 7:30; it may end around 10 p.m. wrapping up emails, or inputting notes into Salesforce.

A territory is large; the bulk of the day is spent driving or standing in hallways waiting to see a doc. The total contact time across 12 physicians (a typical call day) may only be 30 minutes' time.

## Technology Realities

**Reps are utilitarian users of technology and not super tech-savvy. 90% of work is done from an iPad. Phone use is limited.**

Tablets are used to display sales enablement pieces during conversations with docs.

Reps still leave behind a lot of print-based materials; some HCPs use tablets and laptops to search for info. Others rely on those print pieces or reprints of journal articles, studies, etc.

# LEARNING JOURNEYS (THIS ONE IS FOR A SALES REP)

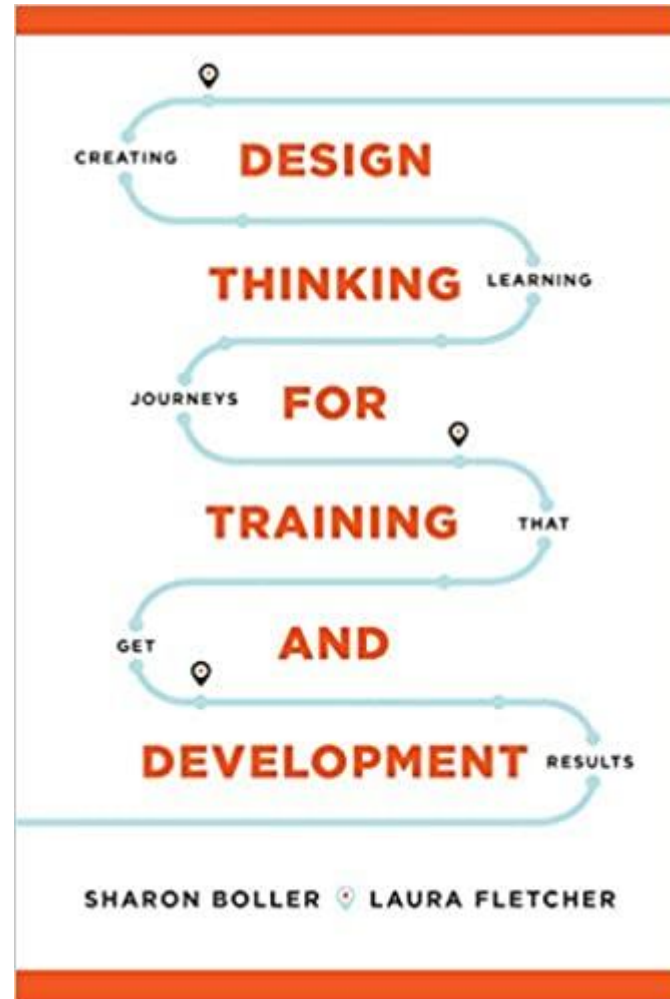
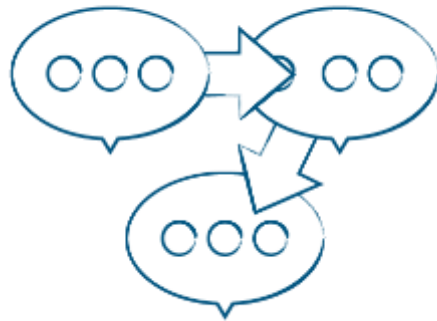
Values hitting sales goals and helping patients.

*“Show me how to use info within a sales call.  
Give me reinforcement so I can build confidence.”*

Struggles to building confidence after formal training.

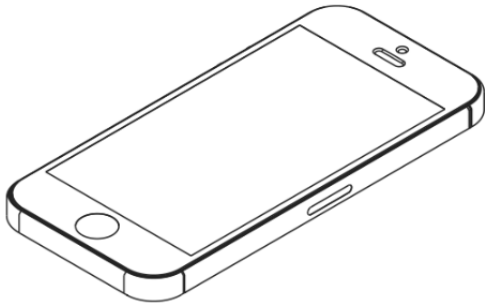
Notice	Commit	Learn & Practice	Repeat & Elaborate	Reflect & Explore	Sustain Long-term
Launch communication campaign: “How to win scripts and make a difference”	Ensure training descriptions are focused on how to use new messaging during sales calls	Video demos: 30-sec, 2-min, 4-min, and 7-min calls Gamified practice activity modeled after the sales call flow	Video coaching tool for feedback on practice sales presentations  Podcasts to listen to during drive time	Provide opportunities to share out success stories  Coaching guide for Sales Manager during ride-alongs	Integrate into development plans

**What  
questions/stories/comments  
do you have?**





# What question(s) do you want to ask? What story do you want to share?



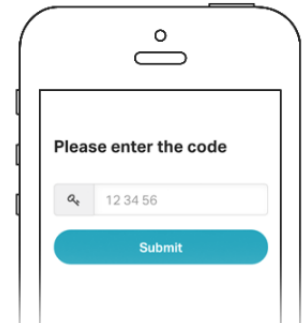
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Enter the code 83 42 and vote!