



**CASE  
STUDY  
DRIVING  
SALES  
PERFORMANCE**

ABBOTT DIAGNOSTICS

# Executive Summary

Abbott Diagnostics is a global healthcare company whose solutions drive smarter decision-making across healthcare organizations. Abbott had undertaken an ambitious project to both upgrade its Salesforce.com environment, and implement a new sales management process.

Abbott engaged Dashe & Thomson to create a change management strategy and learning solution that would enable sales teams apply the new system and processes, and ultimately meet new performance targets.



# Challenges

**THREE PRIMARY AUDIENCES WERE AFFECTED BY THE CHANGE TO A NEW SYSTEM AND PROCESS, REGIONAL SALES MANAGERS, FRONTLINE SALES MANAGER, SALES REPRESENTATIVES. CHALLENGES FOR THESE GROUPS INCLUDED:**

- Regional Sales Managers were frustrated that the new Salesforce environment did not provide aggregate views of critical metrics
- Frontline Sales Managers, who previously operated in a sort of “supersales” role, were challenged to become more active as leaders and coaches
- The new sales management process required strict adherence to a weekly, monthly, and quarterly meeting cadence for all roles

# Our Solution

Dashe & Thomson partnered with Abbott to design a change management strategy that included communications, training, and a measurement approach to track progress during the implementation.

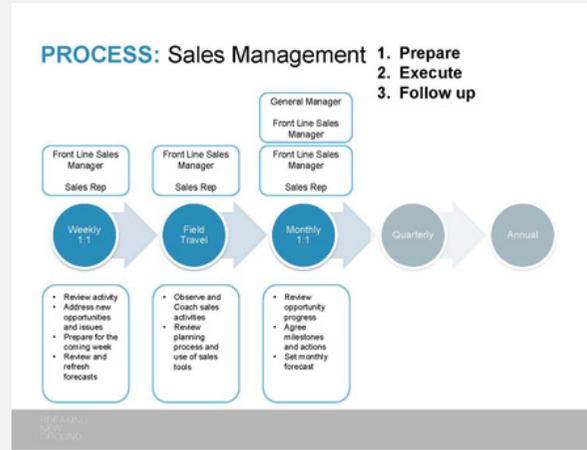
We then designed a role- and activity-based learning program in which all groups would meet weekly to discuss goals, outcomes, and opportunities for development.

Dashe & Thomson developed five case study scenarios, enabling sales personnel to practice new processes, and identify, discuss, and resolve issues with the change. This created an environment for these pairs to be effective in their meetings and to discuss needs and opportunities for improvement.

# SAMPLES

**BREAKING NEW GROUND**  
VALUE CREATION... THE NEXT CHAPTER

Driving Sales Performance  
Day 1



### Service Cadence

Drives Operation Efficiency and Customer Loyalty

- Standardized process to provide a time & task structured approach to managing Service
- Service Cadence Website contains information, metrics, and tools to analyze service performance
- Training via LMS Module and WebEx Sessions completed by June 1, 2014

Service Manager    CSS/RSS/TSS/TSO    Customer Experience Manager    Ambassador

### Powerful Questions Activity

10 Minutes

- In table groups, select one Top Sales Rep Challenge:
  - Will to Sell
  - Pre-Call Planning
  - Territory Management and Territory Planning
  - Execution of Selling Skills
  - Knowledge of Product, Customer, or Market
- Using the *Collaborative Leader-Coach™* framework, develop a sequence of powerful questions (One for each stage: Them – Us – Fit – Act), that prepares you to coach the Sales Rep in the area you've identified as a top challenge
- Be ready to share with the group

### Weekly 1:1 Agenda with Dashboards and Diagnostics

Agenda Item	Time	Goals	Reports / Preparation
Purpose, Benefit, Check with Call Agenda Review	3 Minutes	Establish the direction and purpose for the call	None
Rep Items to be Added	2 Minutes	Provide the reps the opportunity to introduce items that need discussion	None
Review Action Items from Previous 1:1	5 Minutes	Review progress made from last call	Task Completion Report Events for Previous Week
KPI Review, Conclusions, Discussion	20 Minutes	Discuss management conclusions regarding KPIs. Reward and re-enforce good outcomes. Identify improvements. Gain agreement on next steps. Don't debate, go by the facts presented.	Sales Activity Contract Compliance Expiring Contracts Business Snapshots Top Opportunities Funnel Report
Forecast Review	10 Minutes	Ensure pipeline is filled, growing, and advancing. Ensure rep forecast is realistic.	Forecast Report
Next Week's Schedule	5 Minutes	Ensure the rep is adequately prepared and is visiting the correct accounts and opportunities.	Events for Upcoming Week
Summarize, Agree, and Document Actions to be Reviewed at Next 1:1	10 Minutes	Agree on expectations for the upcoming week.	None

# ILT - Sales Enablement

# SAMPLES

ABBOTT DIAGNOSTICS DIVISION				
Weekly 1:1 Worksheet				
Sales Representative:		Date:		
Territory:		Manager:		
Purpose / Benefit Check / Items to Be Added:				
#	Dashboards & Diagnostics	Key Questions	Insights	Discussion Points
1	Task Completion Report	<ul style="list-style-type: none"> <li>• Tasks complete?</li> <li>• Tasks outstanding / progress?</li> <li>• Critical tasks?</li> </ul>		
2	Events for Previous Week	<ul style="list-style-type: none"> <li>• All events logged?</li> <li>• Focus on right opportunities / prospects?</li> <li>• All events closed?</li> </ul>		
3	Sales Activity	<ul style="list-style-type: none"> <li>• Total calls?</li> <li>• Priority accounts &amp; roles?</li> <li>• Opportunity creation &amp; advances?</li> </ul>		
4	Contract Compliance (CLM-launched Countries Only)	<ul style="list-style-type: none"> <li>• Customers compliant?</li> <li>• If not, why?</li> <li>• What is the plan to make customer compliant?</li> </ul>		
5	Expiring Contracts without Opportunities	Opportunities created: <ul style="list-style-type: none"> <li>• Current Year?</li> <li>• 1 - 2 years?</li> <li>• 3 - 4 years?</li> </ul>		

Weekly 1:1 Worksheet			
Summary / Take-Aways / Agreements			
Coaching			
Them <i>"Understand their perspective"</i>	Us <i>"Share your insight"</i>	Fit <i>"Focus on one development goal"</i>	
Act <i>"Agree on next steps / action plan"</i>			
Action	Who	When	

ABBOTT DIAGNOSTICS DIVISION									
Role-Play Observer Worksheet									
Observer:	Date:								
Coach:	Coachee:								
How well did the coach?:									
1	Follow the Agenda?								
2	Use the worksheet (Developing key insights from Dashboards and Diagnostic reports)?								
3	Ask powerful questions?								
4	Apply the Collaborative Leader-Coach™ Model (Them – Us – Fit – Act)?								
5	What went well / Opportunities to improve?								
Overall Rating:									
1	2	3	4	5	6	7	8	9	10
Poor				Good					Excellent



# How It Helped

Because we employ a role- and process-based approach to instructional design, the Dashe team quickly recognized gaps in Abbott's sales processes and system procedures. Our solution included developing a dashboard that provided an aggregate view of metrics that sales staff had not yet seen.

This solution enabled the sales teams to work together effectively, identify new opportunities for development, and reach target metrics.

# Feedback

The Abbott Diagnostics management team was thrilled with the results. They found the practice-intensive approach especially effective, and that learners quickly had gained a solid understanding of the new sales management and meeting cadence.

Abbott's sales leaders were eager to roll-out the changes across the company, with the support of Dashe's change and training solutions. We delivered a train-the-trainer to allow the core team to deliver this solution globally.

# Let's make learning happen.

We look forward to working with you to design your next learning solution.

[DASHE.COM](https://dashe.com)

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