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WARNING SIGNS THAT YOUR FIELD
COACHING SOLUTION WAS
DESIGNED FOR ROBOTS

AND HOW TO RESCUE YOUR TEAM BEFORE IT'S TOO LATE

Using a CRM tool for feedback and field coaching is a little bit like using a fork to eat soup. Inefficient, uncomfortable, and ultimately a messy process that's going to make your team miserable. If you've got a CRM tool that offers a bolted-on coaching component, you might think using it could save you the trouble of deploying a purpose-built solution. You might think it could save a lot of money. You might think it won't impact the quality of your field coaching and development.

You might want to think again.

If you chose your CRM tool hoping to have it successfully double as a coaching and development platform, you've probably already realized your mistake. Coaching is a human skill that requires a purposeful, flexible, and precise foundational tool, but CRM coaching add-ons are static, convoluted, and murky. Coaching grafted into a CRM solution will give you just what you pay for it. Next to nothing.

If you recognize your solution in the warning signs below, it is almost certainly a CRM bolt-on that is sucking the humanity, flexibility, and effectiveness out of your field coaching and development strategy.

Consider making a real investment and doing better by your team by deploying a purpose built solution for coaching.

1 Your employees are frustrated
by the need for cumbersome work-arounds

Is your field losing time and getting frustrated trying to use a system that was not purpose-built for field coaching and development? Does preparing for a field visit mean pulling data from multiple systems and cobbling them together? Does tracking competencies, proficiency levels, action items, developmental areas, progress-to-date, sales analytics and KPI data mean painstakingly retrofitting information that already exists in one system into another?

A proper coaching solution will already be intuitive and simple—saving your team hours of time and hassle, so they won't need to do backflips to conduct simple, targeted coaching processes.

2

You can't get there from here

If you can't connect coaching to the rest of your resources, like your LMS, feedback and recognition process, and performance management system, you're roadblocking yourself. **Are you carrying a huge administrative burden as your team tries to manually integrate this information?** You probably also don't have full use of coaching features from mobile devices or tablets, and your team is spending valuable hours building work-arounds to get the information they need. Your managers and sales representatives need access to data and systems that speak to one another—not just to your CRM, but also to other tools your field commonly needs, such as your LMS and performance management system.

3

Coaching
has degraded
into the flavor
of the month

Is your organization so constrained by limitations that you might as well be using antiquated MS Word, MS Excel, PDF or other "paper" based field coaching tools? The collateral damage of a CRM-based coaching app will suck the creativity from your coaches. Have your teams pared back their coaching efforts to event-based coaching, rather than the responsive, dynamic coaching plans that should be arising from field rides? If you're trying to coach from a CRM system, you have probably downgraded to the least common denominator, just to make things work. Your teams can do so much more without these constraints.

4 It doesn't fit
your sales Culture

Another problem with a sub-standard coaching tool is the mismatch it creates with your culture. Sales culture is rarely uniform, and can vary significantly by franchise or even from unit to unit. Perhaps one of your more seasoned sales teams has a two-way street style of working where representatives initiate and own accountability for their coaching—identifying their own ride-along objectives, obstacles, KPIs or development areas. Perhaps another team is more manager-driven. **Can your platform accommodate both styles in a single infrastructure?** (Hint: If it's a CRM tool, it can't.) A CRM tool will lack the ability to integrate with your processes, adapt to different internal sales cultures, and use the language and concepts that are specific to your coaching philosophy. Ensure that your coaching solution includes customization and configurable process workflows.

5 It treats your
employees like robots
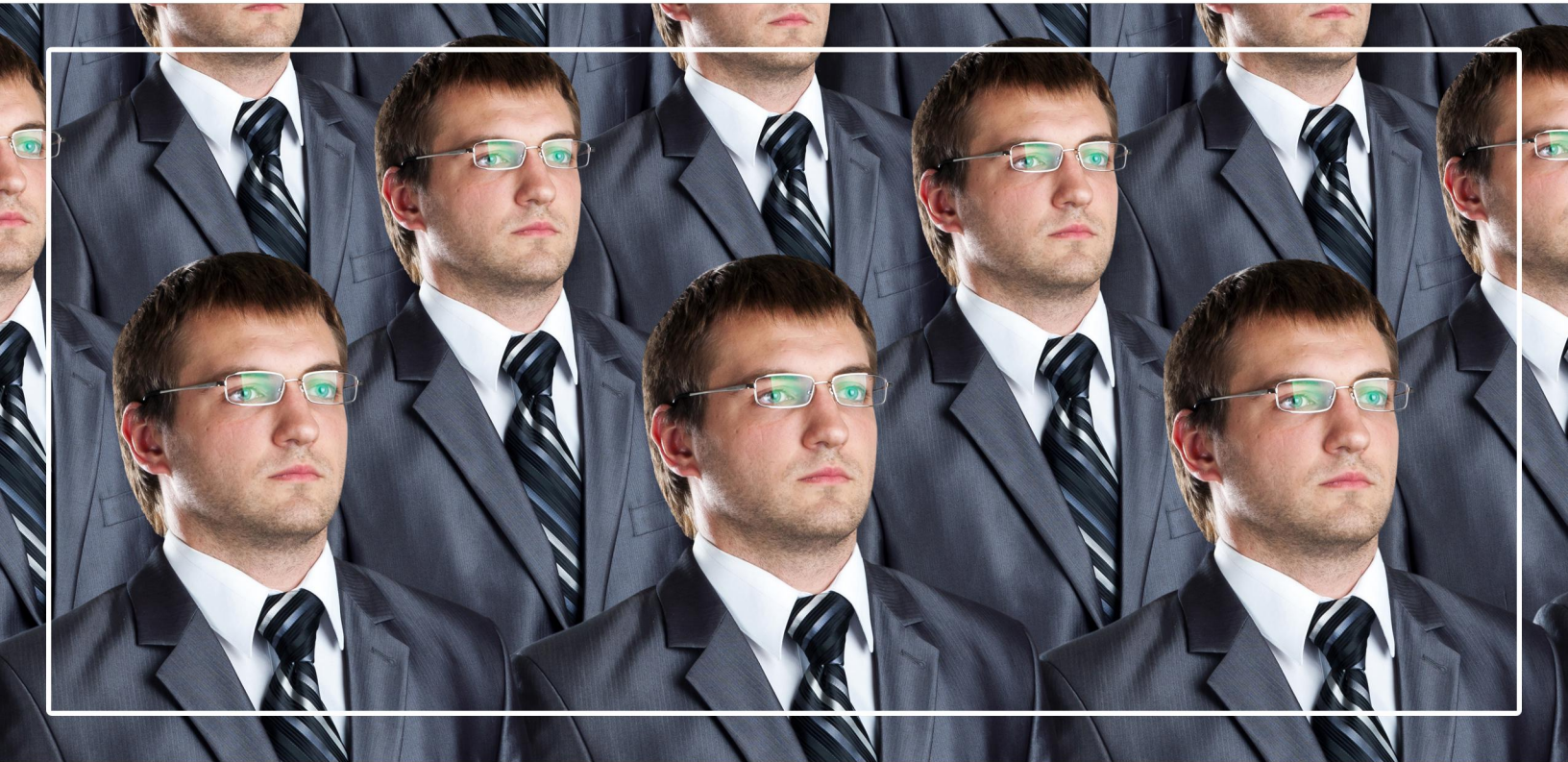
Your employees are unique individuals, with individual strengths, challenges, and KPIs. On a single team or cohort you might have significant deltas in role, tenure, skills or key metrics. A team selling HIV treatments may have a much different set of processes and needs than one selling vaccines, for example. A one-size-fits-all CRM-based coaching solution doesn't see those differences, and doesn't offer customization that responds to individual competencies and needs, all under a consistent, adaptive process. If your solution is treating your team like a bunch of robots, you can do better. Coaching should never be boilerplate and transactional. Your sales team deserves a continuum of customized coaching.

6 You can't see
Anything

When coaching apps are tacked on as an afterthought, they seem designed to keep you in the dark. A lack of consistent reporting and real-time, trending analytics will frustrate your second line managers. They will not be able to see action items or progress, and they will be forced to create work arounds in order to get any analytics at all. Your reporting should give you instant access to current data and trends and improvements over time. It should be intuitive and centralized, and implement strategic, data-backed organizational decisions that will move the needle on your business

7 It isn't aligned to your **talent management strategy**

Is your coaching tool missing basic feedback functions? Is it disconnected from key elements of your broader talent management strategy, such as performance management? You need a system that can integrate with how your teams are structured—able to simultaneously support groups with different metrics, goals, and objectives, all while remaining aligned to individual development plans that ultimately facilitate both traditional and new age performance review processes. A robust coaching and feedback platform offers targeted competency levels that helps bring competency, selling, coaching, and core values models to life while maintaining an organic common lexicon of language that drives culture and performance across your organization.

If your team is struggling with any of these needs, a cookie-cutter CRM bolt-on is not going to get you where you need to be. Here's a checklist of criteria you can use to evaluate iCoach's purpose-built field-coaching and development solution against a CRM tool:

Key Advantages Checklist:

iCoach vs Leading Life Sciences CRM for Field Coaching & Development

Criteria	iCoach	Leading CRM
Not a "bolt on"- Built specifically for Life Sciences Field COACHING & DEVELOPMENT	✅	❌
Provides flexible and fully customizable coaching forms and configurable process workflows (multiple FCRs based on Business Unit need, rep vs. manager-initiated coaching, role-based competencies/skills, etc.)	✅	❌
Facilitates a true coaching and development continuum vs. singular, event-based training (previous session summaries, action items, competencies/skills coached to in histories flowing into current coaching opportunities)	✅	❌
Engaging, simple user experience with web-based and native mobile applications	✅	❌
Links to targeted training resources (via LMS to help close the gap between coaching and training)	✅	❌
Provides other feedback vehicles beyond the FCR essential for coaching and development (Quick Feedback, Actions/Tasks/Assignments, Video/Distance Coaching, Coach-the-Coach)	✅	❌

Offers dynamic coaching report/conversation builder to allow for clients to configure fully configurable coaching templates based on their specific organizational requirements	✅	❌
Provides Individual Development Plan (IDP) capabilities and feeds and facilitates the Performance Review Process within the application	✅	❌
Offers Performance Review/Appraisal capability linked to cumulative and on-going coaching and development (HRIS integration available) to help close the Performance Management loop	✅	❌
Provides a large variety of real-time, field development-focused dashboards, analytics, and reports on all system activity at (i.e. individual, team, territory, district, region, and organizational levels)	✅	❌
Offers other field development functionality within the same application to support future organizational needs (mobile LMS with training review/assignments, learning credits, surveys, assessments, certifications, team collaboration and district boards, meetings & events, etc.)	✅	❌

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