

# PC MENTORING & COACHING

## Case study

San Francisco conference | February 2016



# Agenda

1. The business context
2. The solution
3. The methodology
4. The outcomes for the client
5. The outcomes for Talentuum

1

# The business context

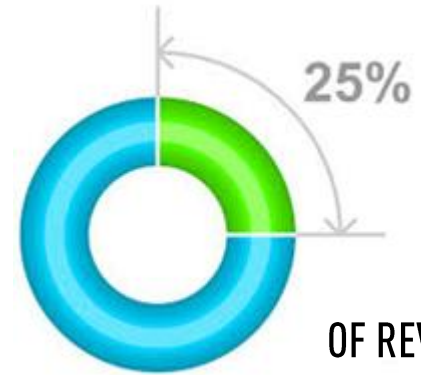


RESIDENTIAL SERVICES DIVISION

±400 SP | ± 45 SM

3 1/2

YEARS IN OPERATION



OF REVENUE



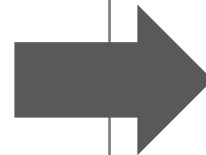
ON GOING SALES TRAINING



FOCUS OF MANAGERS: NUMBERS



NO FORMAL TRAINING for MANAGERS



1



QUEBEC &  
ONTARIO

2



QUEBEC &  
ONTARIO

2

**The solution**

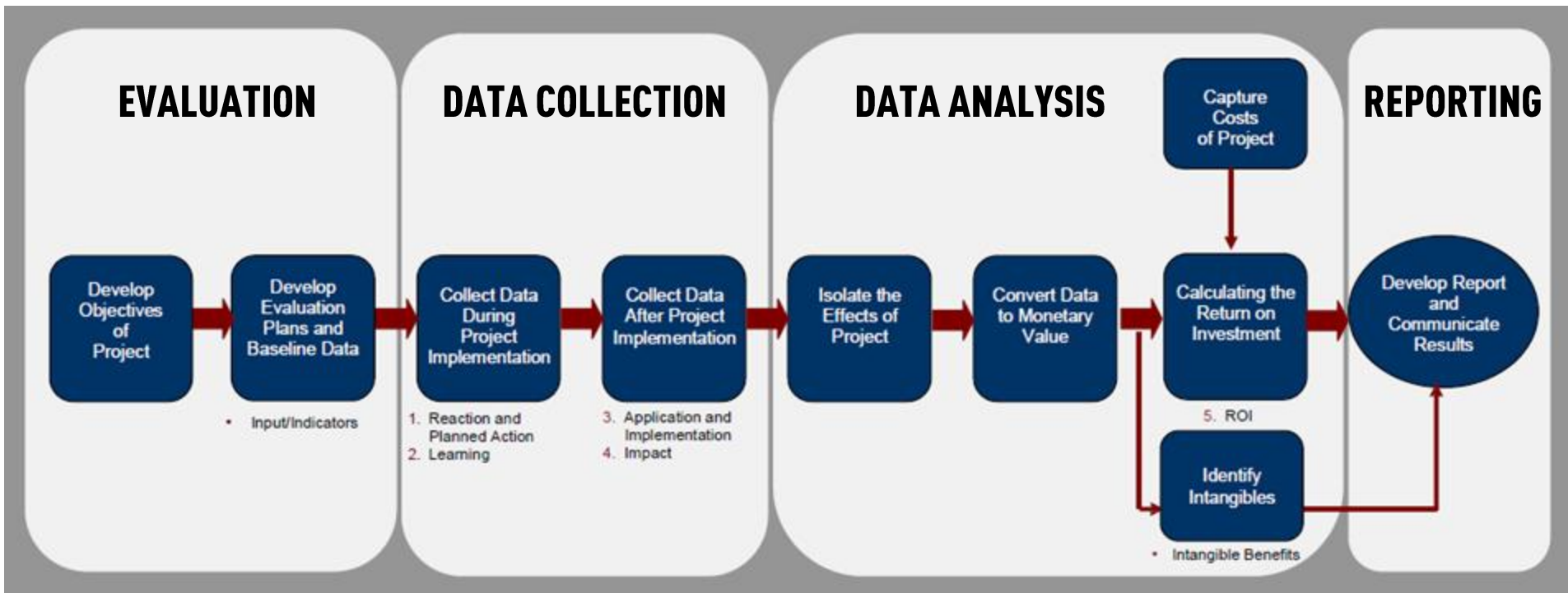
	GOAL	RECOMMENDATION	DETAILS
1		<p>Persona communication styles survey</p> <ul style="list-style-type: none"> <li>• Self perception</li> <li>• Perception of employees</li> <li>• Game plan with Mr. X</li> </ul>	<ul style="list-style-type: none"> <li>• ±45 managers</li> <li>• Wave 1: May 2015</li> <li>• Wave 2: October 2015</li> </ul>
2		<p>Adaptation and deployment of the two day program <b>MENTORING &amp; COACHING</b>.</p> <p>Module 1: The coaching mindset  Module 2: The coaching styles  Module 3: Trust, empathy and flexibility  Module 4 &amp; 5: Coaching for performance I &amp; II  Module 6: Coaching effectiveness</p>	<ul style="list-style-type: none"> <li>• Adapted program</li> <li>• 3 groups</li> <li>• 2 days per group</li> </ul>
3		<p>Follow-up program - Seven coaching sessions (1/week) which include:</p> <ul style="list-style-type: none"> <li>• Reading of articles on best coaching practices</li> <li>• Knowledge assessments on key elements of the MC program</li> <li>• Weekly coaching calls of 30 to 45 minutes (recorded)</li> </ul>	<ul style="list-style-type: none"> <li>• 7 week of coaching calls</li> <li>• Group coaching</li> <li>• Focus on comprehension and application</li> </ul>

3

**The methodology**



# Philipps ROI model: 4 key steps



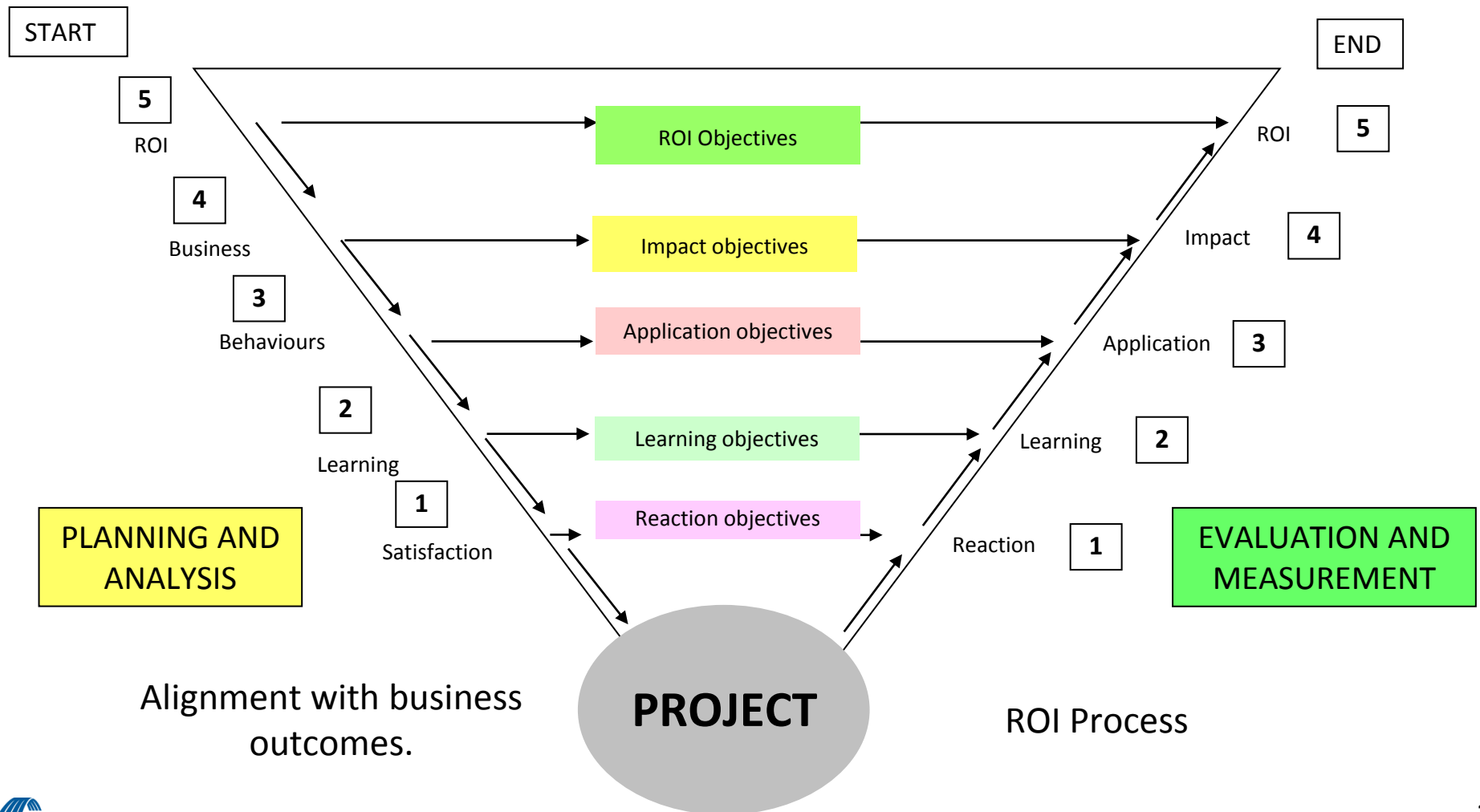
1

2

3

4

# Planning of this study...

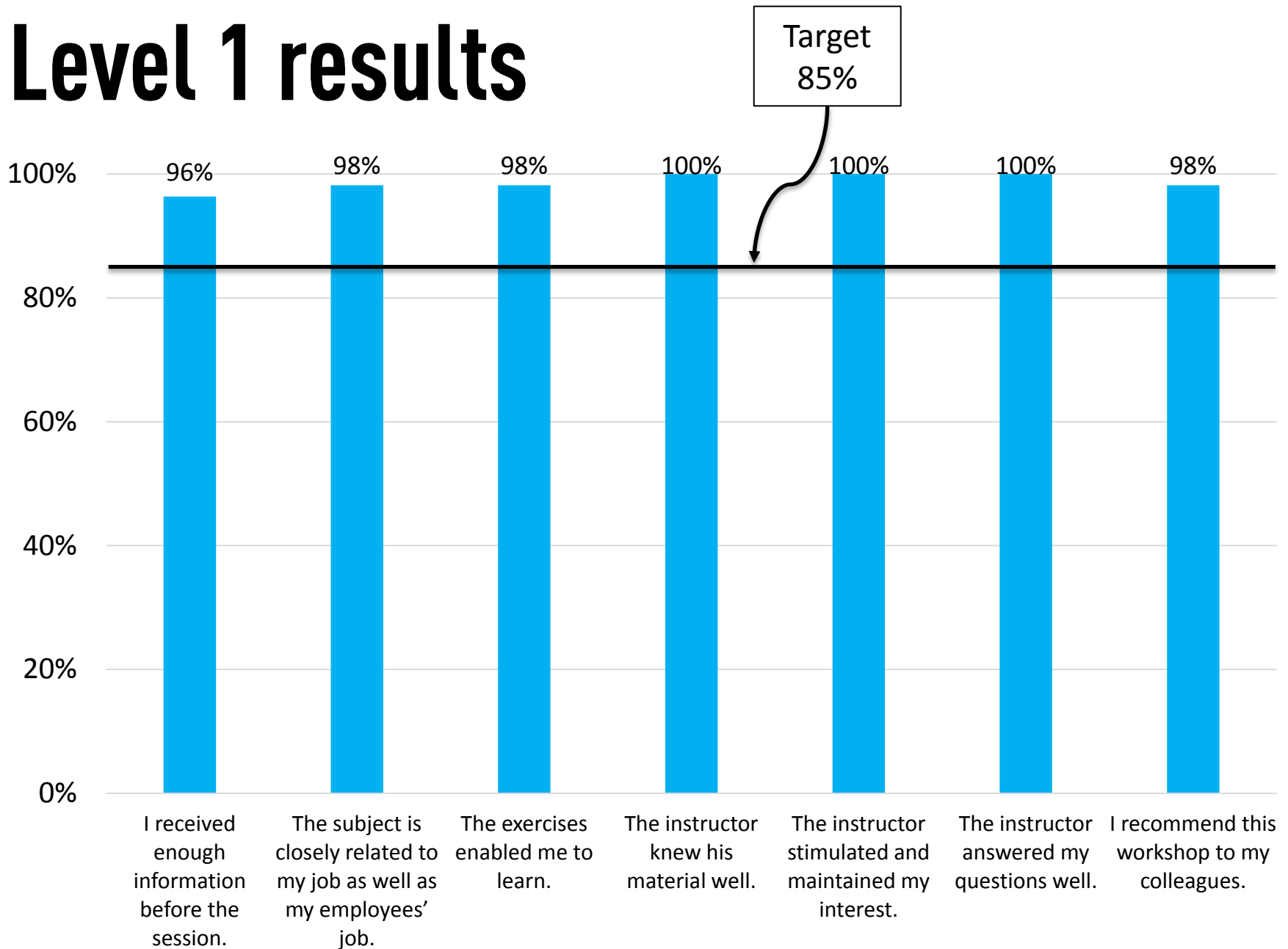


5	ROI	Achieve a cost benefit ratio of at least 2,25 (return of program / fully loaded costs)
4	Business results	Reduce attrition rate by 2% among the reps who have been with ABC for more than 14 days.
		Improve overall productivity of sales people ( $\pm 400$ ) by an average of 5%
3	Application	Ensure managers hold formal monthly coaching conversions with their sales people
		Ensure all key coaching techniques are used at least once a week or more by all managers
		Ensure quarterly management meetings are held where best coaching practices are addressed and insights shared.
2	Learning	Achieve a score of 4/5 or more on all 7 quizzes related to the content of the program
		Achieve a score of 4/5 on the ability to effectively use the 3 pillars of coaching
		Achieve a score of 4/5 on the ability to use the 4D coaching process
1	Reactions	Get a minimum rating of 85% on usefulness of the content at work
		Get a minimum rating of 85% on: usefulness of the content at work
		Get a minimum rating of 85% on: intent to use what was learned after the session is completed
		Get a minimum rating of 85% on: confidence in the ability to use & apply what was learned during the session
		Get a minimum rating of 85% on: I recommend this program to my colleagues

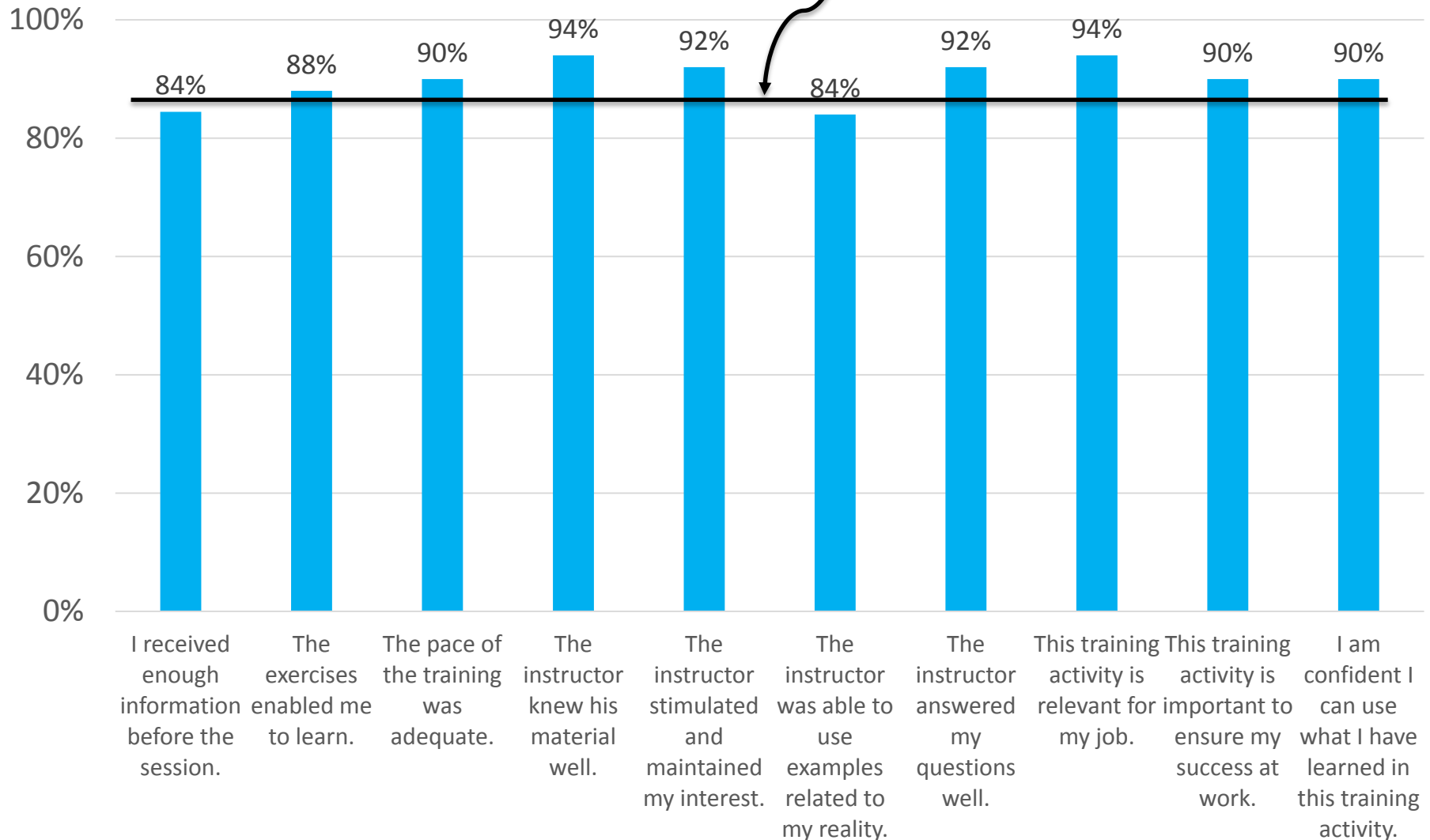
4

**The outcomes  
for the client**

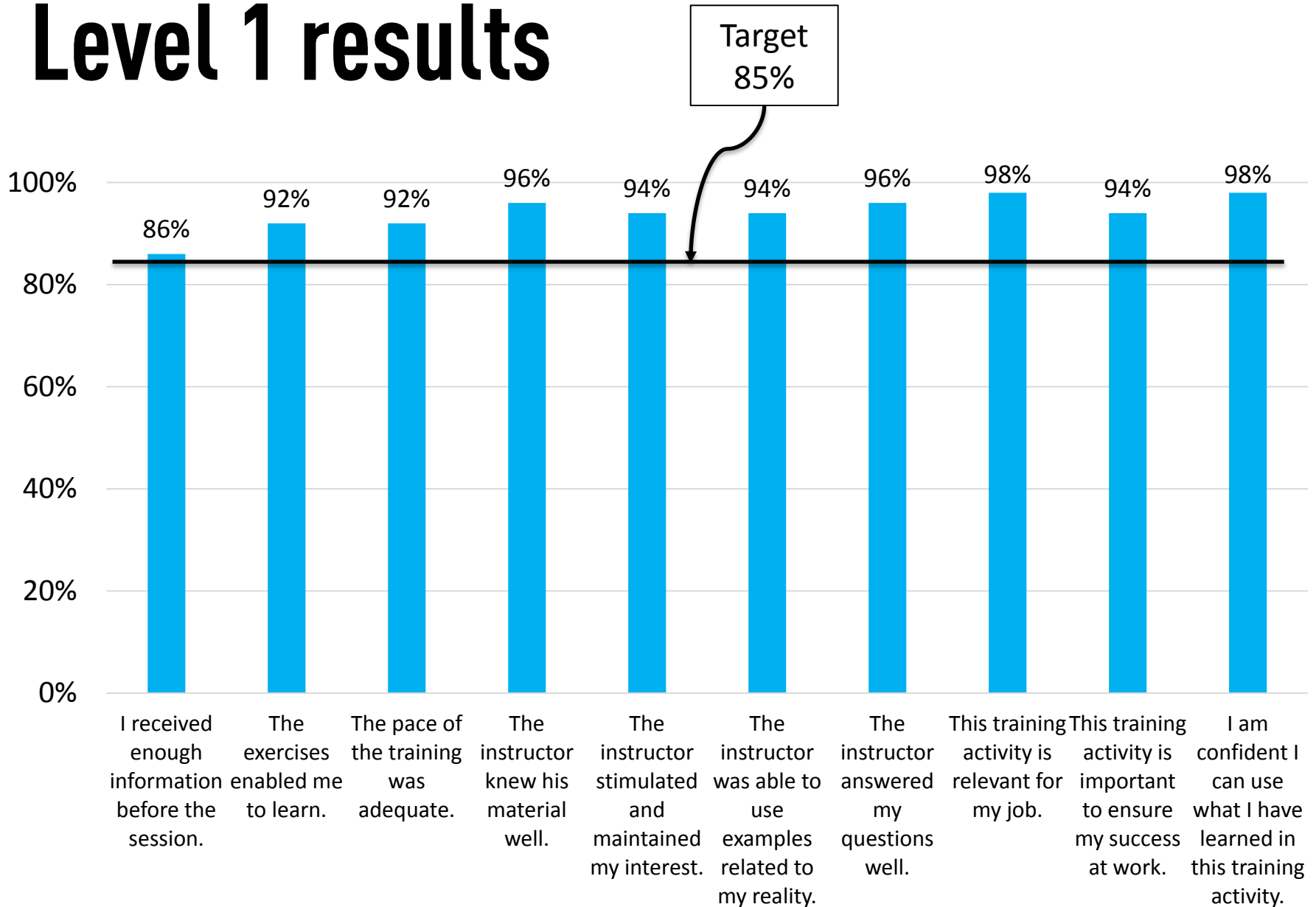
# Level 1 results



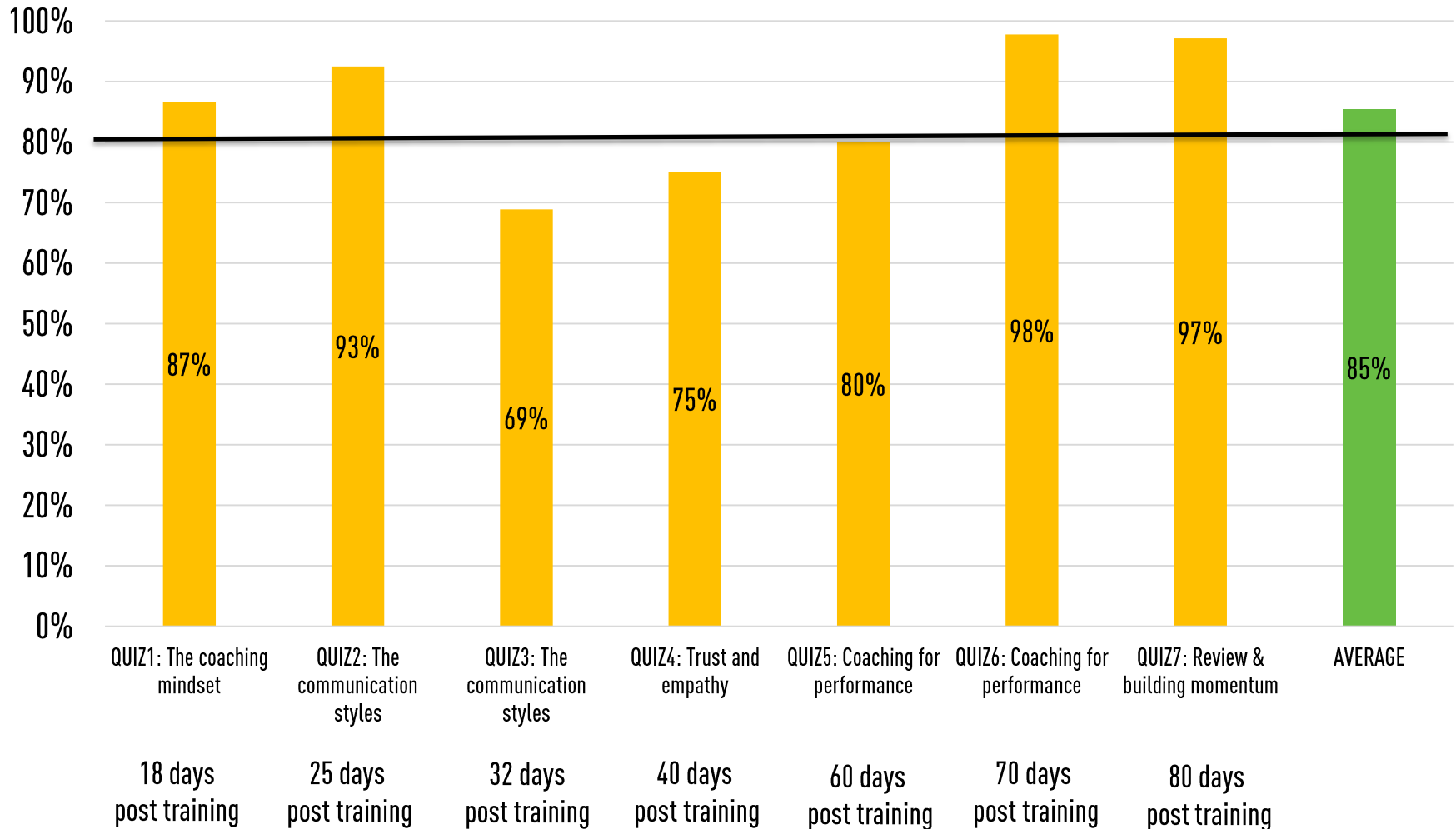
# Level 1 results



# Level 1 results

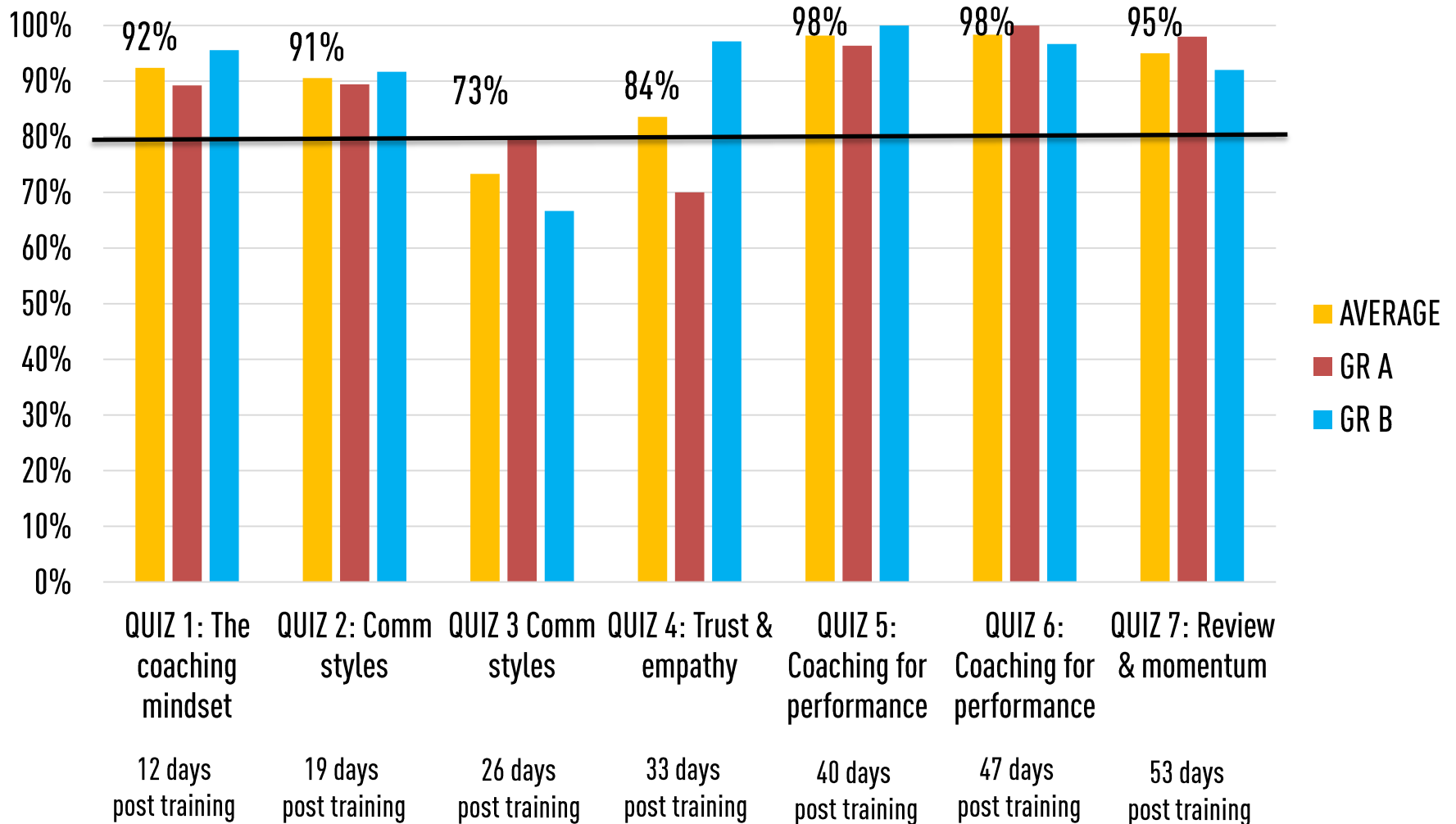


# Level 2 results





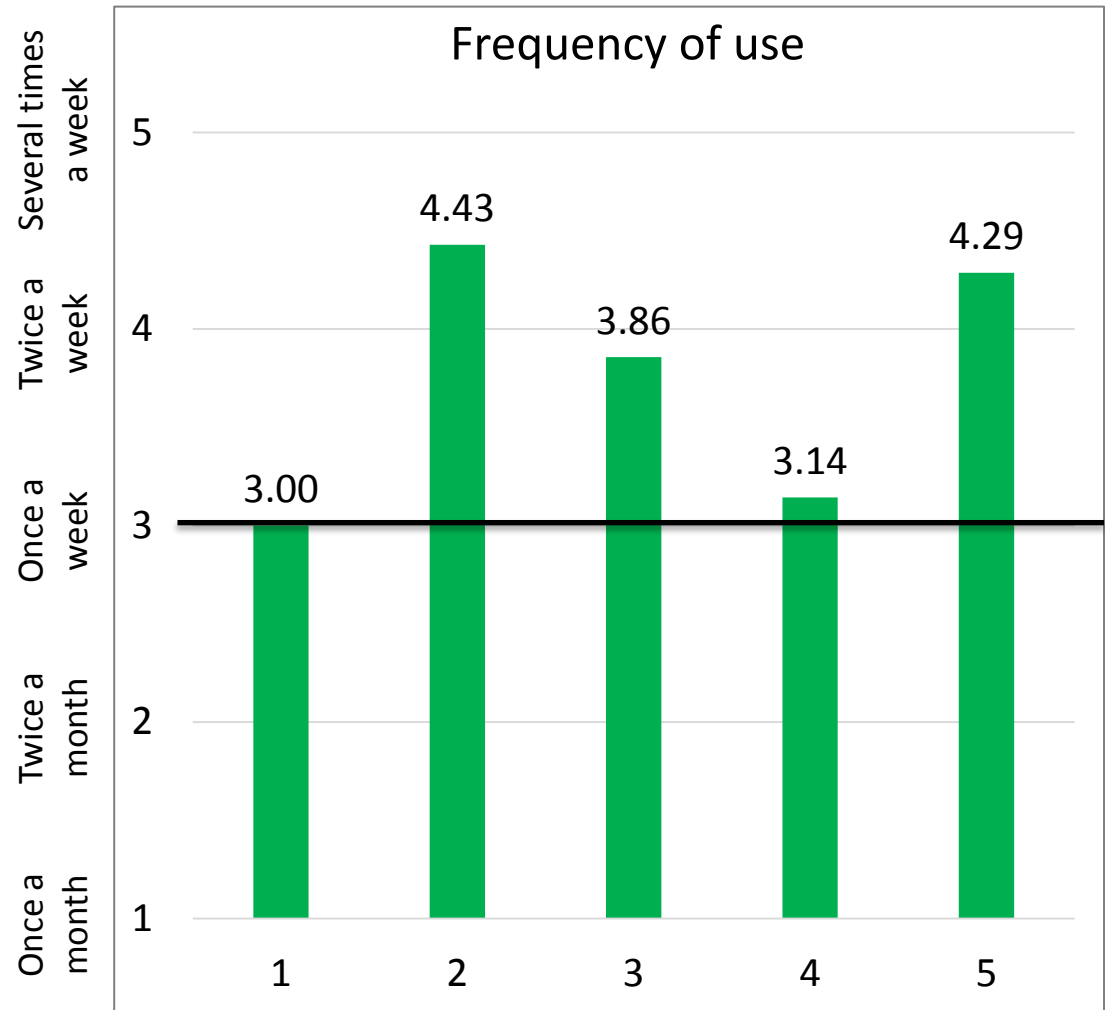
# Level 2 results



# Level 3 results

47 days post training – May 14<sup>th</sup> & 15<sup>th</sup> 2015

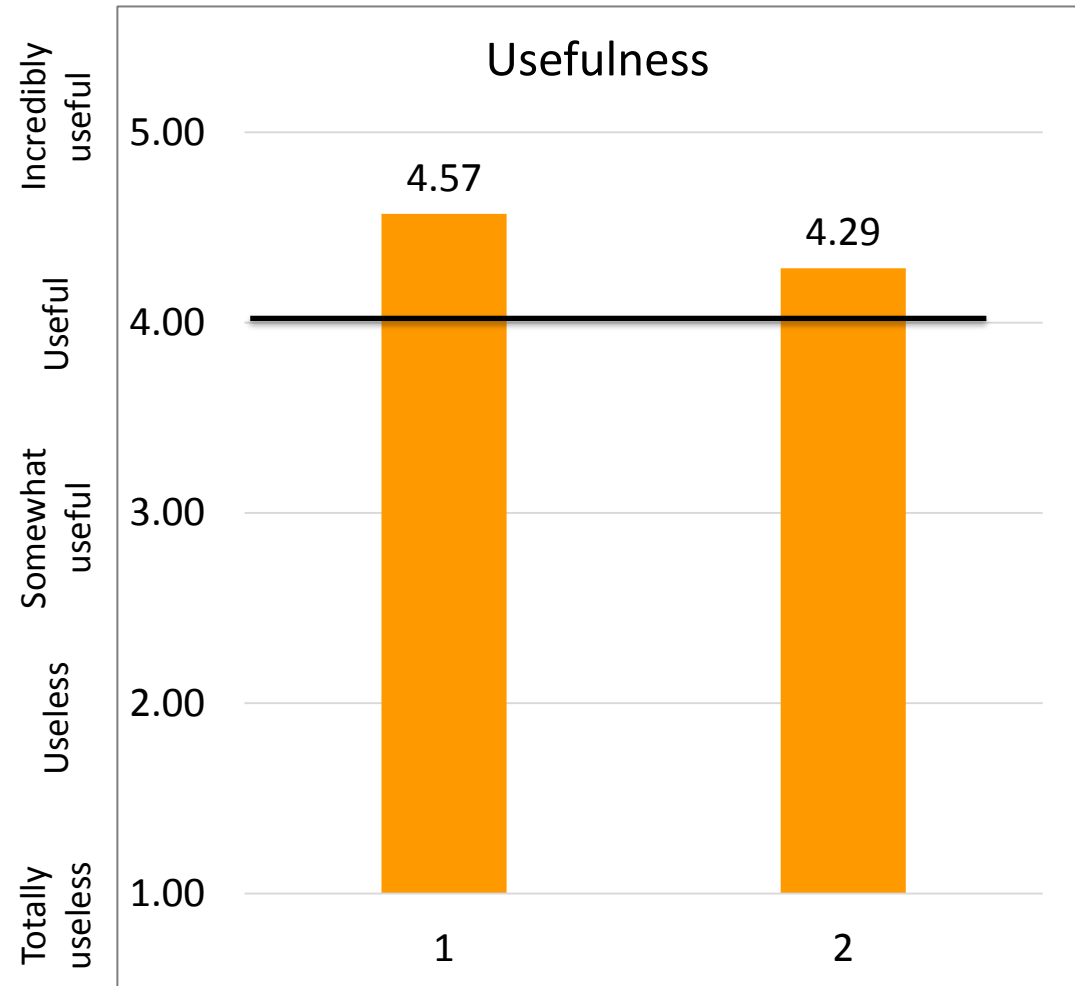
1	I hold formal coaching conversations with my direct reports
2	I use the communication styles model in order to adapt my coaching approach with each of my direct reports. (words, tone, body language, building trust, etc.)
3	I use the 3-2-1 coaching technique
4	I use the 4D system (Describe, Discover, Discuss, Decide) to hold coaching sessions with my direct reports
5	I use, intentionally, strategies to project empathy when I deal with promoters and facilitators



# Level 3 results

47 days post training – May 14<sup>th</sup> & 15<sup>th</sup> 2015

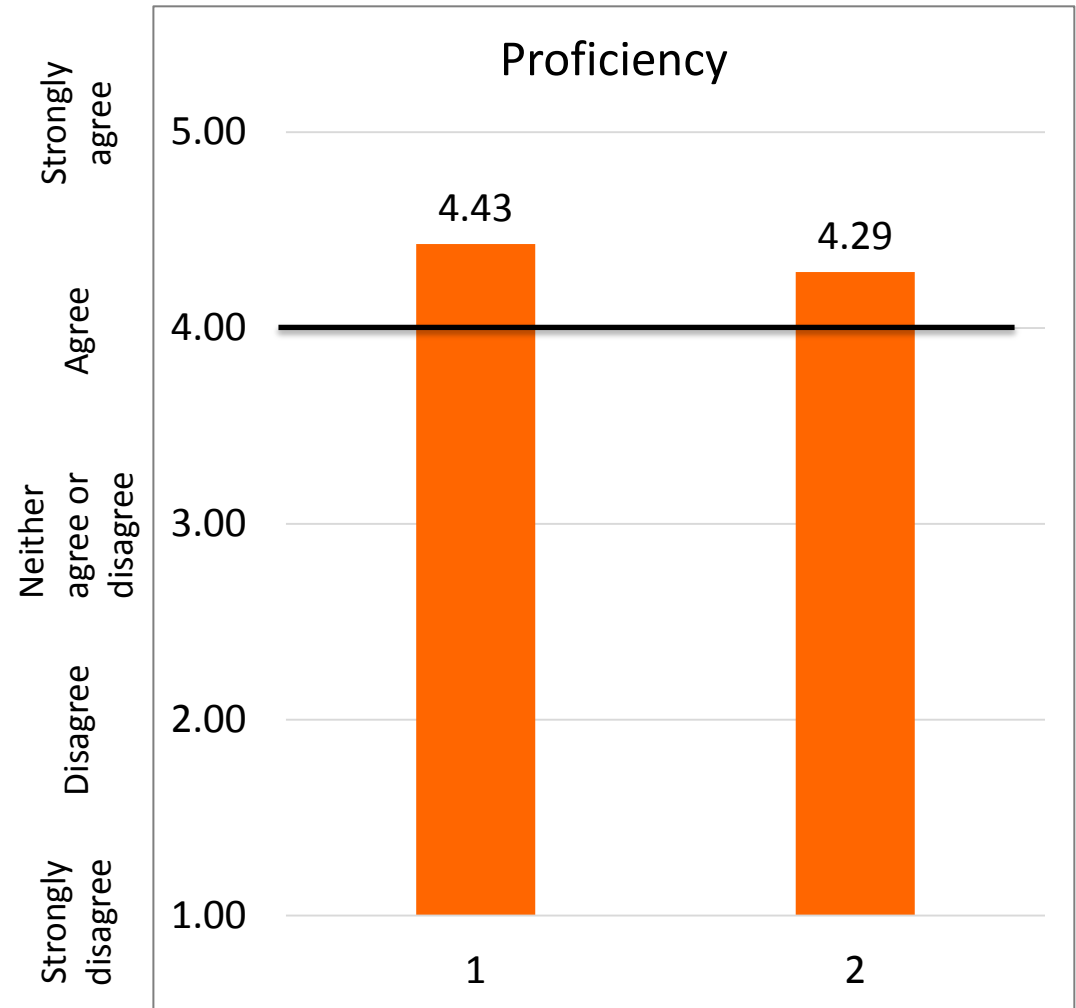
1	I have found the 3-2-1 coaching technique to be...
2	I have found the 4D (Describe, Discover, Discuss, Decide) system to be...



# Level 3 results

47 days post training – May 14<sup>th</sup> & 15<sup>th</sup> 2015

1	Because of what I learned in the FROM TELLING TO COACHING program, I am now more proficient at holding useful and meaningful coaching conversations with my direct reports
2	I am proficient at projecting empathy when I deal with promoters and facilitators



# Level 3 results

47 days post training – May 14<sup>th</sup> & 15<sup>th</sup> 2015

**I have planned quarterly management meetings where best coaching practices will be addressed and insights shared.**

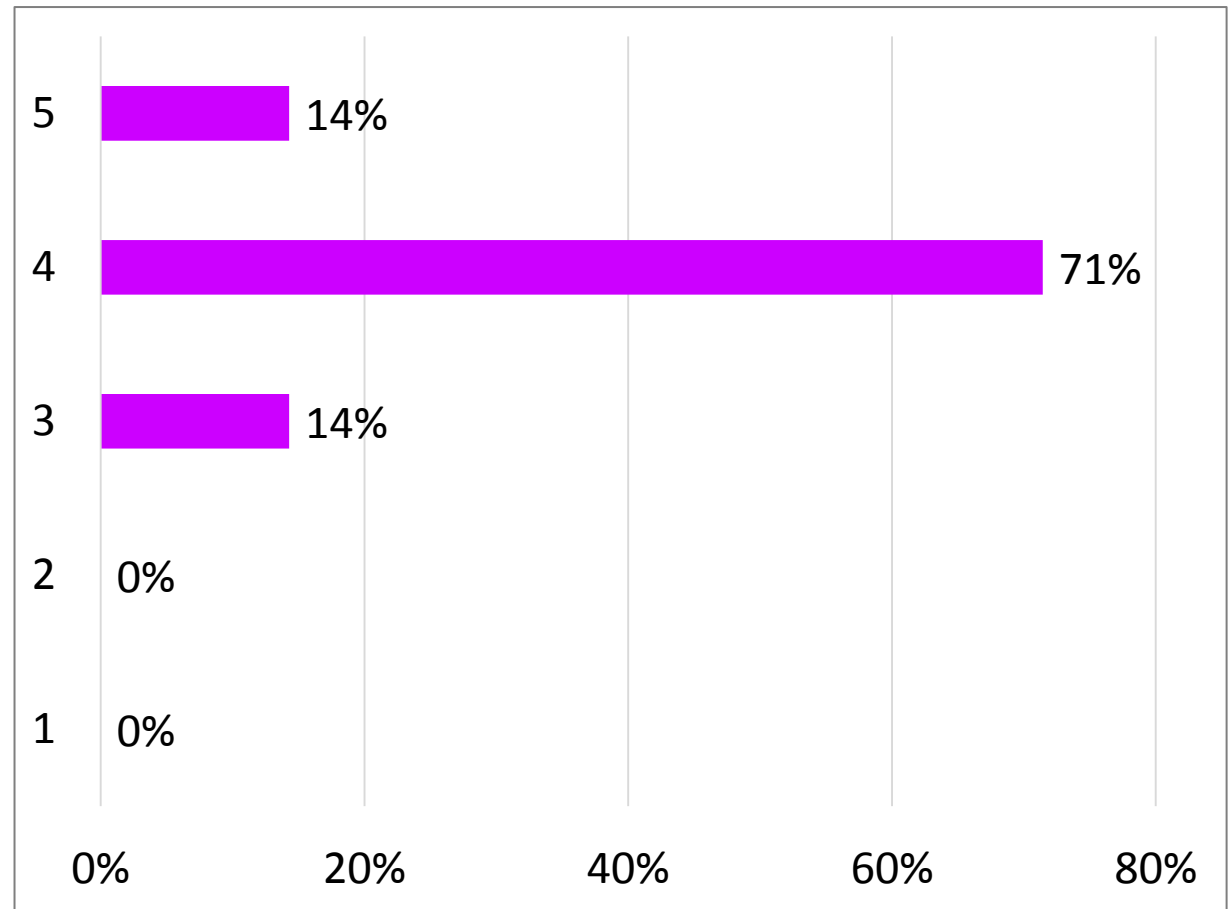
Yes I have and we have already held our first meeting

Yes I have but we have not held a meeting yet

No, I have not made this a priority yet

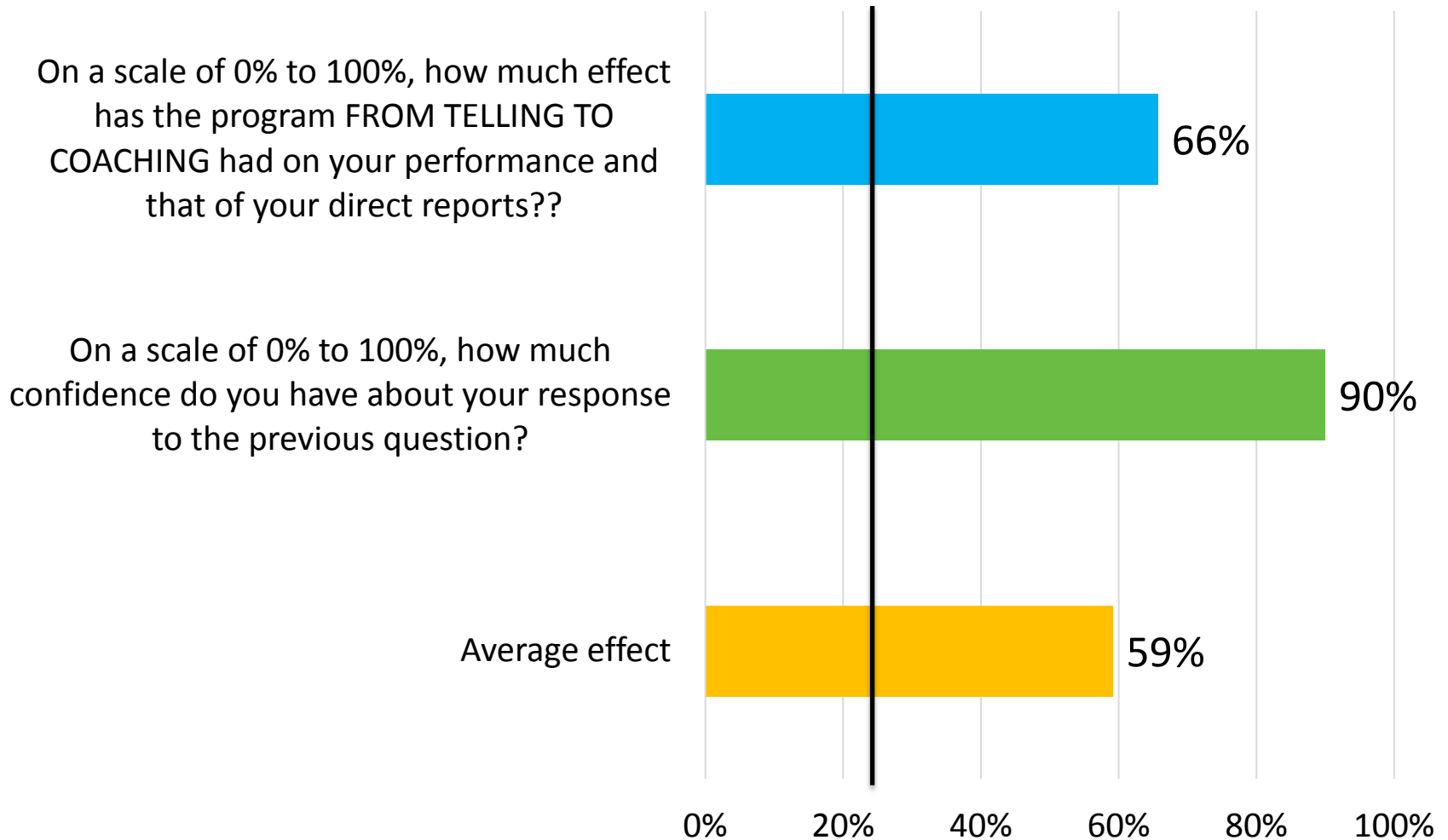
No and I do not intend to make this a priority

I think this kind of initiative would be irrelevant



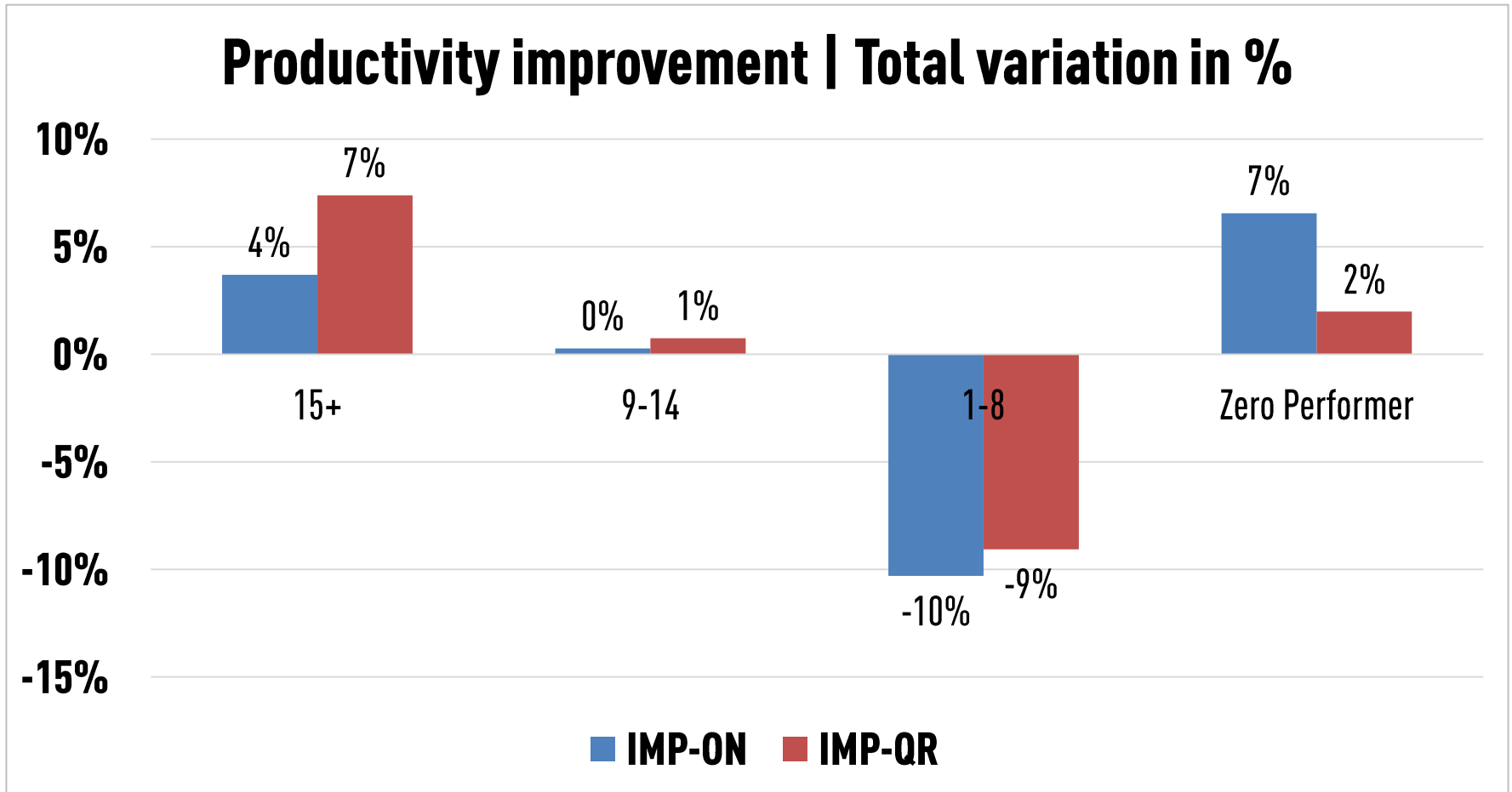
% of respondents

# Effects of the program



# Level 4 results

137 days post training – May 14<sup>th</sup> & 15<sup>th</sup> group



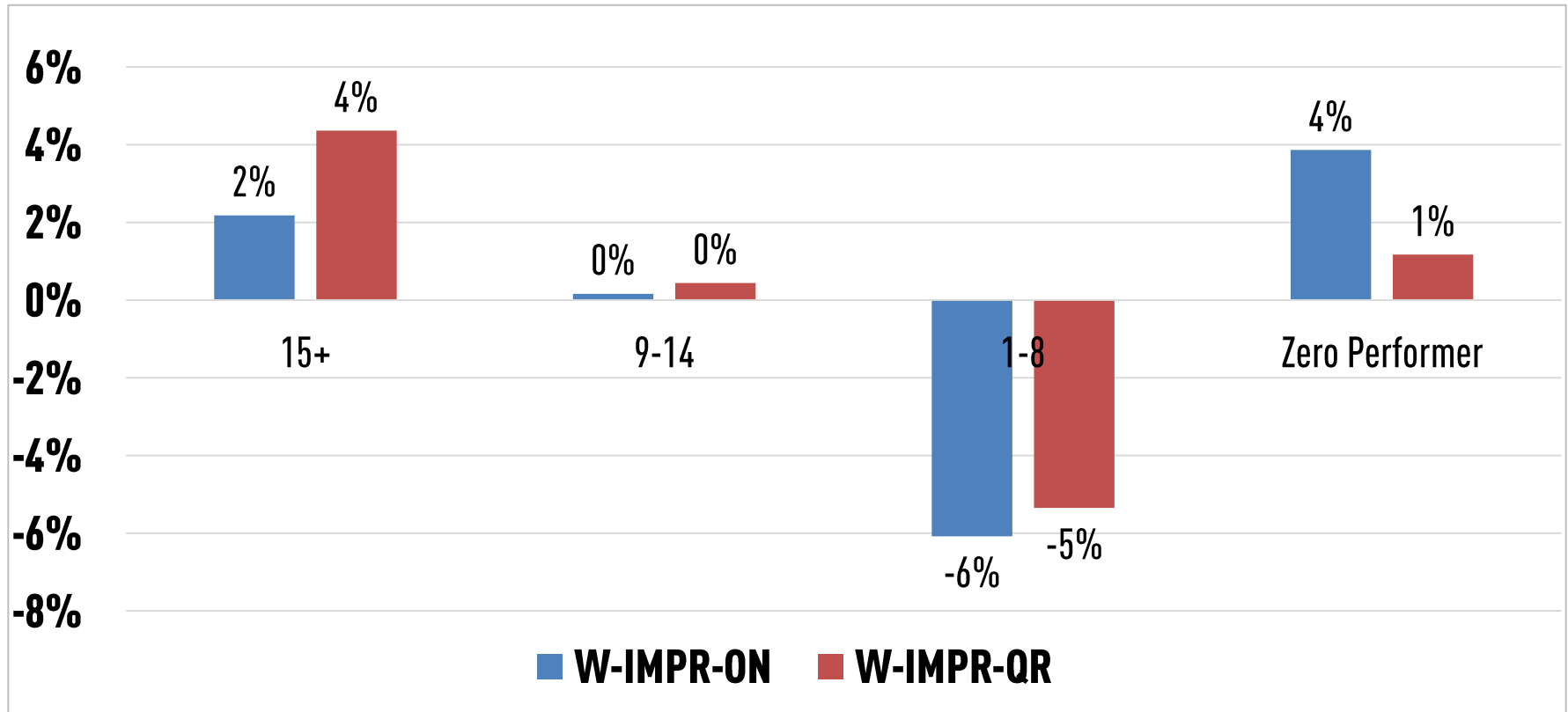
Average productivity POST-TRAINING – PRE-TRAINING

Source: Katie Hurd 12-11-15

# Level 4 results

137 days post training – May 14<sup>th</sup> & 15<sup>th</sup> group

## Productivity improvement | Contribution of program



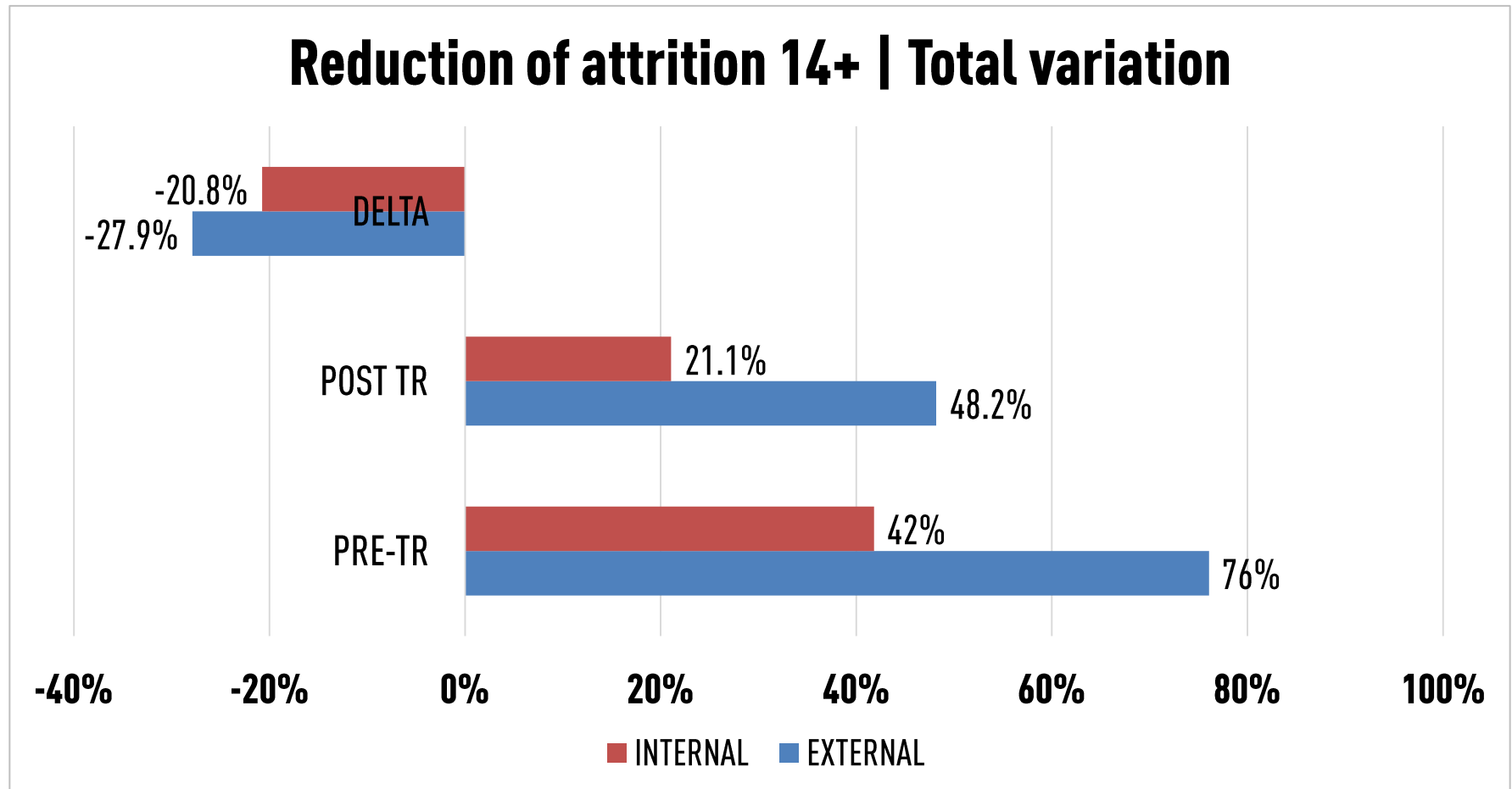
This data is the result of the total variation in productivity X 0,59 (the estimated effect of the program)

Source: Katie Hurd 12-11-15



# Level 4 results

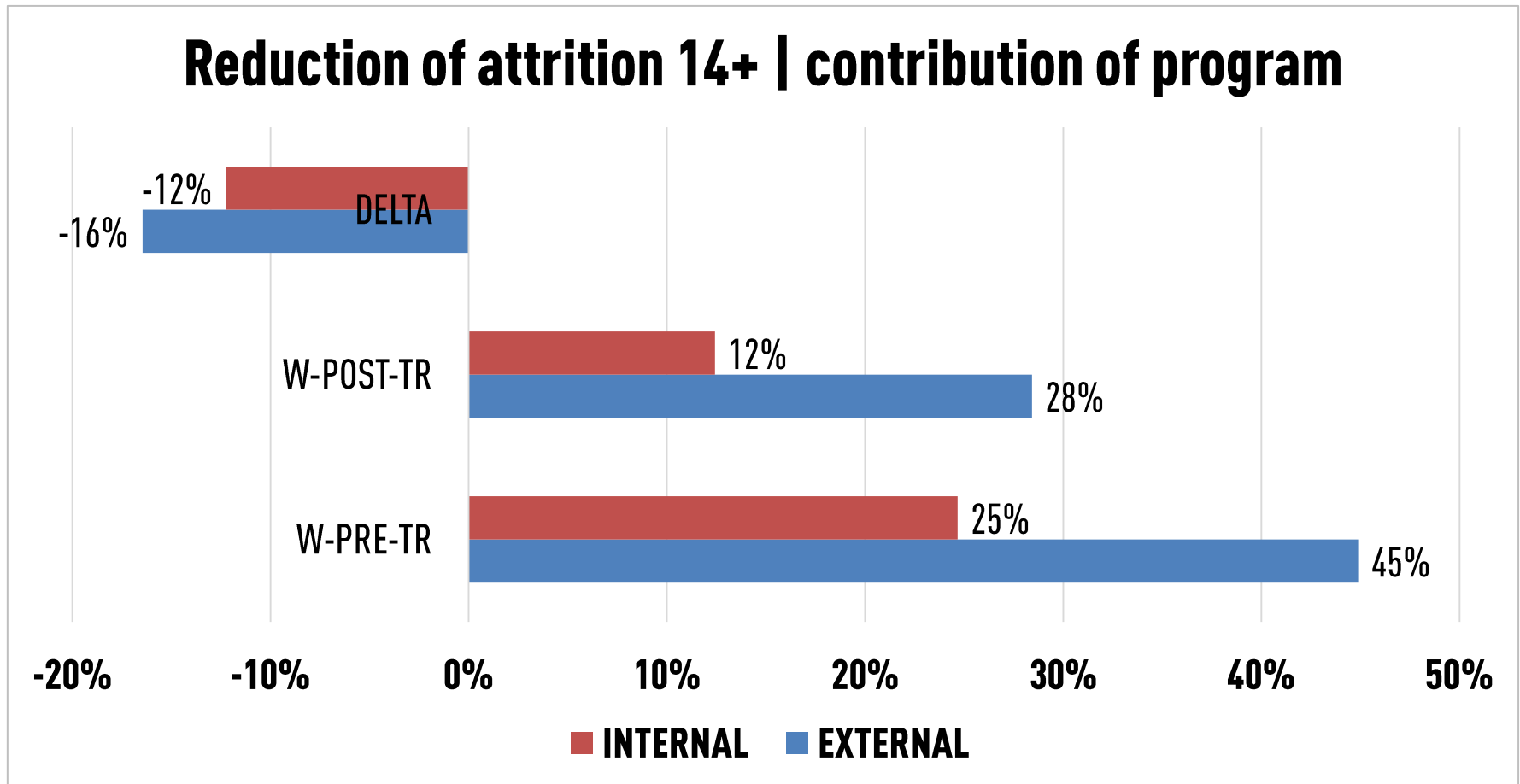
137 days post training – May 14<sup>th</sup> & 15<sup>th</sup> 2015



Source: Katie Hurd 12-11-15

# Level 4 results

137 days post training – May 14<sup>th</sup> & 15<sup>th</sup> 2015



This data is the result of the total variation in attrition X 0,59 (the estimated effect of the program)

Source: Katie Hurd 12-11-15

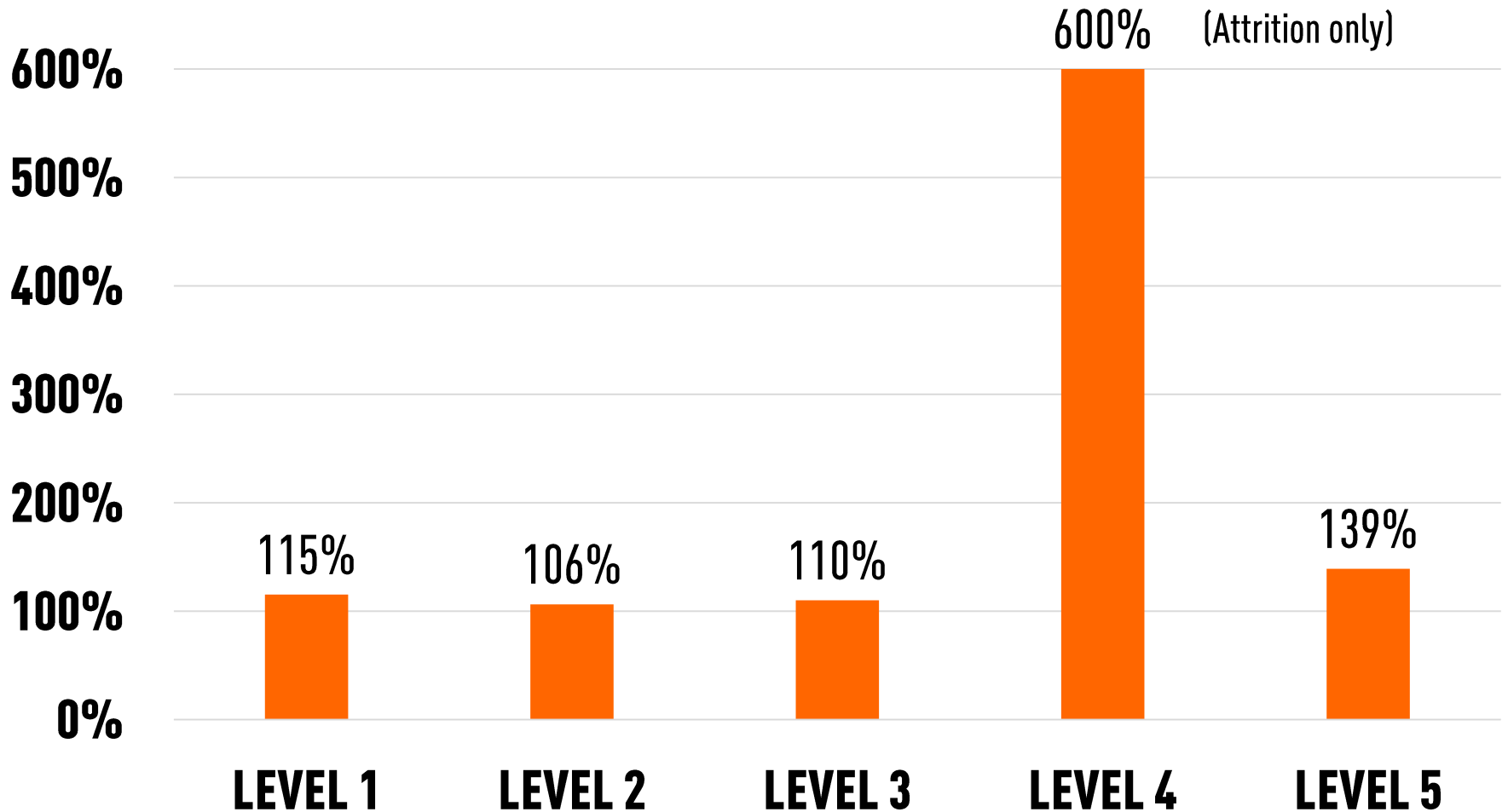
# ROI calculation

- Value of productivity variations: 25K
- Value of attrition variations: 210K
- Total value of variations: 235K
- Fully loaded costs of the program: 75K
- Cost benefit ratio: 3,13 (target was 2,25)

**Each dollar invested in this program  
had a return of \$3,13**

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# Achievement of goals



5

**The outcomes  
for Talentuum**

# Additional projects...

1. Maintenance of momentum through regular activities:
  - a. Quarterly Lunch & Learn events (QC & Ont) on coaching sponsored by senior management
  - b. Monthly coaching calls with all managers
2. Integration of the FTTC program (From telling to coaching) in the onboarding process of new managers (2-3 groups/year)
3. Additional FTTC groups (1-3) for the leaders within ABC's dealer channel – synergy and common language
4. Additional level 3 measurements on all initial groups to ensure people are still using the content of FTTC

# Thank you !

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