

Business Challenge  
**SALES ENABLEMENT**

Industry  
**HEALTHCARE**

Distribution  
**GLOBAL**

Learner Level  
**ENTERPRISE-WIDE**

Learning Design Approach  
**COHORT LEARNING**

"Learners enjoy the interaction with peers, gamification and thoroughly modern look and feel of the Intrepid Learning platform. We think we will see MORE behavioral change and business impact from cohort learning than any other type of learning. That, and at a fraction of traditional classroom cost."

— Mike Duffy, CLO and VP

CASE STUDY

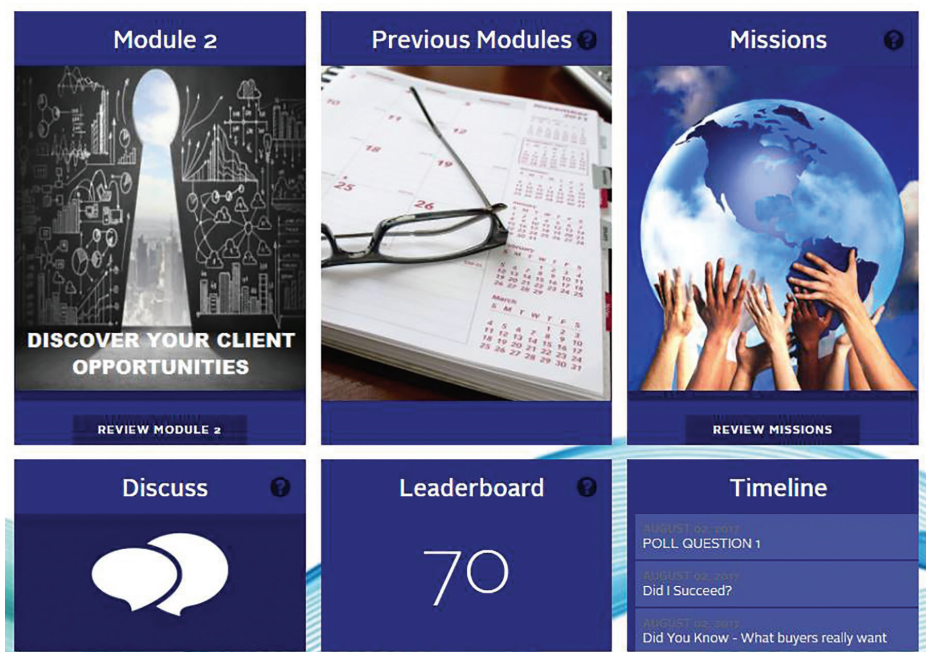
# QuintilesIMS Solves Sales Onboarding Challenges with Cohort Learning Approach

## OVERVIEW

"Business Development: Progressing Your Sales Opportunities."

Around the world, healthcare stakeholders are working to improve real-world patient outcomes through treatment innovations, care provision and access to healthcare. For the information, technology and service solutions they need to drive new insights and approaches, they count on QuintilesIMS.

With a global team of 50,000, QuintilesIMS harnesses insights, commercial and scientific depth, and executional expertise to empower clients to achieve some of their most important goals.



“I enjoyed being able to participate in the course based on my schedule – I prefer the flexibility of online options over classroom training.”

— Learner

“The best thing I liked was applying the learning activities to a live client opportunity which I could easily relate the learning to.”

— Learner

“The training is interactive and easy to understand.”

— Learner

In the past two years the QuintilesIMS organization has grown from 10,000 employees to over 50,000 worldwide. Their business is complex and evolving and includes servicing health care clients in areas such as clinical research & development, technology applications, data analytics, real-world insights, professional services, and commercial outsourcing. QuintilesIMS’s 1,600 sales professionals face pressures including:

- Increasing competition
- More demanding clients with complex business needs
- Aggressive revenue growth targets
- High sales force turnover (for sales employees with less than 3 years tenure)
- Inorganic growth by mergers and acquisitions

## BUSINESS CHALLENGE

In order to build sales skills and capabilities in a very complex and challenging environment, QuintilesIMS’ L&D department needs to deliver training that:

- Upskills their global sales force efficiently and economically across multiple regions worldwide
- Drives consistency in sales and CRM processes
- Improves upon existing sales onboarding and retention practices
- Increases cross-selling capabilities
- Minimizes time out of market for sales training over more traditional ILT programs

QuintilesIMS’s goals for “Progressing Your Sales Opportunities”: to link their learning objectives to specific business outcomes. All of this led to the choice of a blended learning approach delivered on the Intrepid Learning platform, designed and launched in 90 days. The pilot was delivered to 103 employees (89 participants and 14 managers) across 11 countries.

- All learning activities are done in the context of real clients and sales opportunities
- Real-world emphasis on “learning by doing”
- It’s not training you on “how to do your job” but on “how to do your job better”
- Targets a few, value-added skills and behaviors within the sales process
- Focuses on applying simple, yet powerful, planning processes and tools
- Integrates manager coaching and cadence in learning activities and missions to help sustain behavior change post-training
- The team made sure to include the sales managers throughout the process, integrating manager coaching and cadence to sustain expected behavior change from the learning.

“I found all parts of the program most useful.”

— Learner

## PROGRAM DESIGN

“Progressing Your Sales Opportunities” centers on applied learning and real business outcomes using actual client business scenarios and opportunities. The course is primarily self-paced, with blended online and offline activities managed and delivered through the Intrepid Learning platform. There is an in-person peer and manager coaching piece as well.

“Progressing your Sales Opportunities” is delivered via the Intrepid platform and created a learning experience that is:

- Scalable across multiple geographies, time zones, and number of learners
- With social learning activities to maintain high level of engagement
  - Discussion forums
  - Missions (key macro-level activities)
  - Commenting and “liking” of Mission Field Reports
- Full of rich, micro content including documents, knowledge checks, videos, and links to external resources
- Uses gamification elements (leaderboard, badges, best practice sharing, etc.) to fuel interest levels and competition
- Increases cost savings (eliminate need to travel to central location) and minimize time-out-of market for revenue producers by incorporating real-world client opportunities in our learning activities and exercises
- Boosts behavior reinforcement and manager pull-through post-learning
- Improves reporting to business and HR partners on participant activities in the platform

- **Module 1:**

Know Your Client highlights two critical components of building a deeper understanding of a client and their business, beginning with an overview of QuintilesIMS's sales process and how it aligns with the client's buying cycle, as well as key activities needed to advance the sales opportunity at each stage. Also, account planning best practices and the role account planning plays in the sales process. At the module's end, participants create an account plan for their client.

- **Module 2:**

Discover Your Client Opportunities focuses on planning and performing activities to consistently develop client opportunities: knowing where to start and what to look for in order to understand the client's business needs and help them solve their business issues. Highlighted: the importance of early stage planning concepts and tactics. Introduced: planning tools to manage and advance sales opportunities.

## CONTENT: THE BRICKS

The 8-week cohort learning program consists of 4 modules. Learners have 2 weeks to complete each modules' content. Participants are required to bring an actual client opportunity for the applied learning activities.

## APPLIED LEARNING: THE MORTAR

All assignments in each module center on applied learning, using existing clients and business opportunities in real time. Learners focus on their most pressing needs—call planning for example—provided with the tactics and tools to prepare for their client meetings. Then, they create their plan and share the output with their peers and managers within the online learning experience.

Participants are assigned into cohorts of 3 or 4, with a blend of senior and junior salespeople in each group. Cohorts are expected to meet once per module outside the platform (generally via conference call or web meeting) to share information, strategies, ideas, insights and challenges, and work on that module's "Mission" or applied learning assignment. Each learner submits a Field Report for each Mission, which is viewable by the rest of the program participants, enhancing the sharing of knowledge even farther.

## EXAMPLE MISSION FROM OPPORTUNITY PLANNING MODULE:

- Members of the cohort select one opportunity from the group
- All members of the group review and discuss the opportunity and apply the input and insights to refine their own individual Missions
- Afterwards, participants share their Mission field report with their manager for additional feedback and coaching

- **Module 3:**

Plan Great Meetings focuses on practicing advancing client opportunities by using consistent planning tactics and tools for more impactful client meetings and calls. Included: several key planning elements to create a sound strategy for results-oriented client meetings. Introduced: planning tools to help manage and advance sales opportunities.

- **Module 4:**

Advance Your Opportunity is centered on the importance of qualifying client opportunities. Participants apply the qualification process using simple, powerful qualification criteria to help determine the likelihood of winning an opportunity. QuintilesIMS created the bulk of the content internally but each module also has an Additional Resources section with links to online learning courses for a deeper dive into specific areas, as well as supplemental collateral from external sources like Forbes, Harvard Business Review, Sales Executive Council (SEC) and other leading practice sources to further reinforce best practices on a specific topic.

By applying the review & refine process to their specific business challenge (client opportunity), each participant in the cohort is able to create a better work product through collaboration. In addition:

- Managers get line of sight into the work their team members are doing and how they're executing against the process
- Senior salespeople collaborate with and mentor junior salespeople
- Everyone benefits from the peer group's experiences and insights

## RESULTS

Initial results are very promising and "Business Development: Progressing Your Sales Opportunities." is now an integral part of QuintilesIMS's new sales hires onboarding program.

### **Program participants have been able to able to:**

**Increase win rate & average deal size.** The average sales cycle is 9 to 12 weeks and the team needs to look at data over a longer period to get meaningful measurements, however, they conducted an impact survey 3 months after the training ended and confirmed that 88% of respondents are now using and documenting their opportunity plans in CRM.

**Create and shape client needs more efficiently:** The 3-month impact survey confirms that 81% of respondents are able to align their client business needs to QuintilesIMS's offerings and solutions.

**Better collaboration:** The 3-month impact survey confirms that 64% of respondents are now receiving regular feedback from their managers

### **In addition, QuintilesIMS is seeing the following skills rise in their sales force:**

**Leveraging the power of networks** through regular collaboration and teaming (collaborate and add value/insight to opportunities through peer and manager review and feedback)

## Manager verbatim:

- “I strongly recommend this program to all new joiners in the commercial team.”
- “I saw the reinforcement on operational excellence which would further improve their skills to engage and develop accounts.”
- “It was good to apply a real opportunity in the training.”

“I found the opportunity planning module most useful because it helps me better understand my clients’ current situation & how can we help them solve their business issues.”

— Learner

**Achieving consistency in managing and tracking client opportunities** (this will lead to a healthier sales pipeline with more qualified opportunities, which in turn will lead to better financial forecasting and reporting)

In addition to the above learning / business outcomes, **internal Global Learning & Development goals met by the program include:**

- **Prove that QuintilesIMS can deliver** an interactive sales training program to a globally distributed audience (they had never done this successfully before, particularly outside of traditional, class room-based, instructor-led training programs)
- **Insure completion rates were better than completion rates** for virtual and/or self-study learning programs (better than 50% of benchmark enroll-to-complete conversion rate)

**Integrate manager coaching and cadence to sustain expected behavior change** from the learning (sales managers are considered the lynch-pin for success – without their support, success won’t happen).

**Effectively deliver an interactive sales training program** to a globally distributed audience

**A completion rate of 73%** (far better than benchmark enroll to complete conversion rate of 50%)

**Manager engagement level of 100% for our program.** Not only were managers engaged in their participants’ activities, they also recognized the business value of the training and the usefulness of the toolkits provided to managers. Manager feedback was over 90% positive for all of these indicators:

- Improve performance of my team
- Relevant and applicable to their job
- Recommend this training to new team members
- Manager toolkits were relevant and useful

**This program has now become part of QuintilesIMS’ new sales onboarding program**—all new sales hires are required to complete the course during their first 90 days and it is offered globally each quarter.

## Client Testimonial

"We have gotten tremendous feedback on our cohort learning programs. Learners enjoy the interaction with peers, gamification and thoroughly modern look and feel. We think we will see more behavioral change and business impact from cohort learning than any other type of learning. That, and at a fraction of traditional classroom cost. Great stuff!"

— Mike Duffy, VP and CLO of QuintilesIMS