

# ATDSFL Champions of Learning Best Practices Submission Form

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**Q1 Organization (as printed on certificate):**

SAP

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**Q2 Project/Initiative Title:**

Data-Driven Coaching

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**Q3 Name of Person Submitting:**

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**Q7** Write a brief summary of your project/initiative. Please limit your response to between 150 and 200 words.

Data-Driven Coaching is a 3-month program that gives SAP's Account Executives (AEs) access to personalized reports and 1-on-1 coaching designed to improve their performance in the field.

The reports—available to coach and AE—are based on a close analysis of each AE's Customer Relationship Management (CRM) and Human Capital Management (HCM) data and include over 300 variables related to driving successful deals.

Upon receiving a report, AEs can clearly see how they compare to top performers in key areas such as Average Deal Size, Deals Won, and Number of Products Sold (to name a few).

Then, for each identified opportunity area, the report makes several recommended actions to improve performance—from specific training recommendations to Subject Matter Experts who can provide additional guidance.

The reports also serve as the foundation for the AEs' coaching sessions, during which our coaches (certified, internal employees from a range of backgrounds) review the report and help guide AEs toward finding their own solutions to the business challenges they're facing.

The coaching sessions, when coupled with the strategic learning recommendations in the reports, have delivered tremendous results for AEs and created a strong foundation for their ongoing career development and long-term success.

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**Q8** What was the business/organizational need that led to this initiative? Please limit your response to between 150 and 200 words.

Maintaining a position of leadership in today's IT industry, requires SAP to equip our sales force with the latest sales approaches and techniques to meet customer needs and achieve bottom line results.

Over the past several years, however, sales metrics for our Account Executives (AEs)—while in line with or slightly above industry standards—had not met sales management expectations.

To boost performance, SAP's Business Operations and Sales Learning Team set out to improve upon an already robust sales learning curriculum, which, to this day, includes everything from formal, in-person workshops to MOOCs, simulations and virtual, live classes.

Our analysis revealed two, key ingredients were missing from our training curriculum: effective coaching and prescriptive learning. According to industry experts, effective coaching can “improve performance up to 19%...even moderate improvement in coaching quality—simply from below to above average—can mean a six to eight percent increase in performance across 50% of your sales force” (Harvard Business Review, 2011).

Our efforts to capitalize on these opportunities led to the development of the Data-Driven Coaching program—a revolutionary, new approach to sales enablement that uses coaching and prescribed learning recommendations to pave the way for the organization's success in the Digital Age.

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**Q9** What actions did you take that led to the success of this initiative? Please limit your response to between 400 and 500 words.

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We took several vital actions that have led to the success of Data-Driven Coaching at SAP. They include:

1. During the program's design and development phase we conducted a thorough needs assessment built upon the following components:

A Business & Performance Needs Analysis that included meetings and interviews with sales leadership to discuss options for boosting quota attainment rates and, subsequently, revenue for the organization. We also set out to identify the KPIs that, if improved upon, would help us reach our quota and revenue targets. Our starting point was to measure performance across KPIs that executive management had determined as vital to the organization's success.

We also held interviews with top performing AEs to identify what they were doing differently as well as the characteristics of winning deals.

We also conducted a Learning and Program Requirement Needs Analysis using surveys and interviews with members of our target audience (AEs). Our goal was to better understand a typical day / week in the life of an AE as well as their desire for / perceived value of coaching and personalized learning recommendations.

The findings from our assessment made clear that a new coaching program was worth pursuing. For example, our analysis revealed that improvement was needed across the following KPIs, which, as described above are vital to meeting our revenue goals, including:

- Deals Won
- Accounts Won
- Products Pitched
- Number of Opportunities Created

Our Learning and Program Needs Analysis also revealed a demand by AEs and their managers for one-on-one coaching to build upon and reinforce our extensive sales learning offerings. Management also agreed that coaching would provide added resources to support sales executives and that, if coaches were "neutral" (or, outside of our AEs' reporting line) this would provide a safe environment to help AEs brainstorm and expand their thinking.

2. The next vital action was to establish the program's key objectives that continue to guide our success:

- Improve sales performance (e.g. increase revenue and close rate) of individual quota carriers using Big Data-Driven, 1-to-1 coaching sessions and personalized learning recommendations

- Drive sustainable sales excellence by building on existing enablement and providing a platform to help AEs think beyond the current quarter

-Broaden understanding and implementation of coaching as a tool by expanding the number of colleagues with knowledge and ability to coach AEs / driving employee engagement and retention

3. Our next action was to define Data-Driven Report Creation Process. Given the large quantity of data our organization has available in its CRM and HCM systems, the decision was made to ensure that coaching sessions be guided by facts and insights and not solely intuition.

To that end, our team joined forces with a 3rd party data science firm in an effort to combine our data with external analysis and marry the resulting insights and recommendations with one-to-one coaching sessions.

These actions laid the groundwork for the program's success and will continue to guide our future actions to maintain the program's ongoing impact on the organization.

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**Q10** What outcomes resulted from your initiative and how did you measure them? Please limit your response to between 250 and 300 words.

CRM Pipeline Data Analysis results reveal that the Data-Driven Coaching program has made a significant impact on AE performance and the organization's bottom line.

Improvement can be seen across each of the 4 KPIs measured under our Level 4 Evaluation criteria as well as in the qualitative feedback gathered from program participants.

To isolate the program's impact, we first compared the performance of coached AEs who participated in the Representative Coaching Periods vs a control group of non-coached AEs. Program participants outperformed non-coached AEs by:

- 31% increase in Accounts Won
- 38% increase in Products Pitched
- 40% increase in Opportunities Created

Also, AEs who participated in the Deal Coaching Period closed, on average, 62% more deals in Q4 than they did in Q3.

Other Impact: We have also received tremendous feedback from participants in the Data-Driven Coaching program including the following:

On the value of coaching:

"It was great to talk about one of my opportunities without getting someone else's opinion. Everyone wants to tell me what to do."

Report provides useful information:

"It was great to have recommendations to contact people who have closed similar deals. Links ready to remind me of resources and get to them quickly."

The organization as a Thought Leader:

"I use the fact that our company is doing coaching as a competitive differentiator when talking to my customers' sales leaders."

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**Q11** What information would be vital for other organizations to know if they wanted to replicate your initiative? Please limit your response to between 250 and 300 words.

The implementation of the Data-Driven Coaching and program has taught us many lessons—particularly when it comes to harnessing the power of relevant data to boost sales performance. Key lessons include:

1. Set expectations appropriately and deliberately -- If you ask 5 people their definition of “coaching” you will get at least as many answers. Therefore, it’s important that sales executives participating in a Data-Driven Coaching program have a basic understanding of coaching methodologies and the flow of a coaching session.

This allows for more easily establishing a “contract” at the beginning of each coaching session. In addition, it will help “visitors” i.e., those that are only curious, those that were told to attend, to self-select out of the coaching program.

2. Align with Regional and Line of Business leaders -- Although the sales coaching programs in our organization are run globally, positive outcomes would be impossible without regional and line of business implementation. Communication from known sources, versus a perhaps unknown global name, are more effective in driving participation and in setting expectations.

Local and line of business leaders can also help focus limited coaching resources on market units or teams that may be most impacted. Finally, the regional and line of business teams are sources for coaches to support the program.

3. Both Data and Coaching --There is value in Data-Driven Coaching in its entirety; both in the insights that the data provide and in the coaching. They complement each other. Insights without coaching are not likely to change behavior much. Indeed, when an email only delivery of coaching reports, with no accompanying coaching, was piloted, no differences versus the control group were noted.

Similarly, coaching without the insights provided by the data analysis and reports is often misdirected; coaching topics and goals may be chosen by intuition and not facts. Time is often not spent in the most efficient way.

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