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Dear Reader,

What makes customers loyal to a company? In this article, Ruby Palma, LIM Associate based in Manila, Philippines, reviews the rationale, design and implementation of an Action Reflection Learning-based workshop for a global pharmaceutical company. Ruby highlights the process for developing the workshop and its goals, along with some of the tools and strategies that were incorporated into this one-day workshop.

Enjoy the reading!

Isabel Rimanoczy
Editor

Quote of the Month

*"One person cannot know everything;
that's why we have teams."*

Anonymous



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Addressing Customer Intimacy Challenges: A Sales Force Workshop

By Ruby B. Palma, LIM Associate. Philippines

How can we strengthen our "Customer Intimacy" capability?

The request originated from the Sales Director of the Company, after attending a LIM coaching workshop. Intrigued by the LIM approach, the Sales Director approached us with the following questions that their Senior Management Team (SMT) was facing: *"How can our company*

strengthen customer intimacy? How can we tap the existing organizational wisdom and fully engage our employees towards developing stronger customer intimacy?"

In today's increasingly tough marketplace, companies compete based on best cost, best brand, and best value propositions. Of the three, competitors can quickly innovate and leverage on costs with the use of technology to deliver the *best cost proposition*, and offer leadership in brand features and benefits to deliver the *best brand solution*. However, building stronger customer intimacy is the differentiating factor that continues to be within the direct control of sales teams to create the *best value* in achieving financial growth and productivity gains.

Process for developing the workshop

LIM coaches held a telephone meeting with the Sales Director and a face-to-face meeting with their SMT to learn more about the company — learning its strengths, accomplishments and its major challenges, particularly as they related to the need for customer intimacy. Following exploratory meetings, it was agreed that LIM would co-design and deliver a one day workshop to strengthen the organization's know-how, capabilities and culture in pursuit of this direction. As with all of our workshops, LIM involved key members from the SMT in both the design and delivery of the final workshop.

The first step in this process was involving the team in defining what customer intimacy means; identifying the specific obstacles and challenges to customer intimacy and then adapting our workshop in order to meet the particular needs of this team.

Defining Customer Intimacy

The LIM team met with the SMT to understand their views on Customer Intimacy. A brief session using a SRWR (Stop Reflect, Write, Report) tool to capture top management's individual and collective view of what Customer Intimacy meant to them ensued. What did they see as the key ingredients for achieving customer intimacy? The following elements were identified as key to customer intimacy:

- 1. STRONG PARTNERSHIP:** This can occur if the company treats Customers as allies and partners and if the customer views the Company as the preferred partner.
- 2. CREATIVE/INNOVATIVE SOLUTIONS:** The Company has the capability to conduct creative/innovative activities beyond the required business call.
- 3. CUSTOMER CONFIDENCE:** The Company has the ability to present solutions and solve problems in order to enhance confidence from doctors.
- 4. CUSTOMER LOYALTY:** Refers to the company's capability to retain Customers through sustained trusting relationships

Defining Workshop Goals

The LIM team along with sales team members, HR Director and Sales Director, co-designed the workshop and identified the following outcomes for the workshop:

By the end of the workshop, we will have:

- defined a collective definition of what customer intimacy means;
- coached one another on customer intimacy challenges team members are currently facing;
- learned a peer coaching tool that could be used to address a range of challenges;
- created our own 'Customer Intimacy Tool Kit';
- formed a stronger bond among the team members

To support these learning goals, the LIM Learning Coaches created an open, non-threatening, and fun environment.

Workforce Engagement

The Sales Director shared the Company challenge with the team. He expressed appreciation of the team's past contribution and recognized the expertise in the room. This led the team to focus on a common goal and to share their knowledge and wisdom on the topic close to their minds and hearts—their customers.

Customer Intimacy Peer Coaching [\[1\]](#)

The team was comprised of new and senior Sales Representatives, which paved the way for a highly interactive session, referred to by the HR Director as "the learning laboratory". The Peer Coaching enabled the Sales Team to coach one another on their challenges ranging from winning customers, gaining confidence and sustaining customer loyalty. These were some of the specific challenges that the team members addressed:

How Can I Win Back My Top Cardio Doctor?

How will I get to know all my doctors within 3 months?

How do I get incremental sales?

How can I profile additional doctors?

How do I develop loyalty from the doctors?

Each participant raised several "I" questions relevant to the particular customer intimacy challenge. They had to avoid questions that could result in 'Yes' or 'No' answers, as well as making recommendations, framed as questions. By framing the question in the first person ("What might I do to develop loyalty?") instead of a "You" question ("What might you do to develop loyalty?") it reduces defensiveness and gives the team a richer sense of "owning" the challenge.

As a result of the exercise, team members viewed their challenge with "new eyes". "I" questions that team members identified, included:

- What have I already done? What can I do differently?
- Who else can I ask for support?

- What can I learn from the initiatives of others that went well? What can I learn from the initiatives of others that have failed?

Through peer coaching, additional perspectives on the business challenge were identified thereby suggesting new steps or solutions that team members might implement. Team members realized they can capitalize on internal networks such as their managers and colleagues for support, and listen to the perspective of others. The essence of the peer coaching experience is to not only give participants "fish" (giving them solutions to their challenges) but equally important to teach them "how to fish" (how they can create and implement the processes and structures to find these answers).

Customer Intimacy Tool Kit

The toolkit captured the company's tacit knowledge (the knowledge that resides within each person and the ability to access this knowledge) about customer intimacy, best practices, and organizational resources to serve as a valuable tool for learning and strategy formulation. As expressed by the HR Director, "I saw the value of the experience. It is not just about picking up stock knowledge or training, but more importantly putting our collective ideas to life. Institutional knowledge will not be in our laptops, but in our heads. If we lose our people, we lose institutional knowledge."

Stronger Bonds Formed Among Team Members

Typical of any ARL workshop, participants set norms on how they plan to work together throughout the day. This process can be carried over to ways in which the team can work together outside of the workshop, in their daily operations with each other. The workshop energized the participants to strengthen their communication with each other, strengthen their understanding of each other, support each other on their customer intimacy challenges, taught them to listen thereby strengthening the bond among the team members.

Most Valuable Components of the Workshop

Participants indicated the elements of the workshop that they found most valuable:


- Peer coaching process: This process helped team members to address their own personal challenges, through the process of sharing their challenges openly with their peers. The safe and open environment that was created facilitated this type of open exchange.
- Sharing of "best practices" not only validated individuals' successes. It also gave members additional practices that they might consider using in building customer intimacy.
- Reflection provided an opportunity to also learn from "missed opportunities in the past" and to consider how these learnings could be used to present or future situations.
- Application of these skills and tools to other parts of team members lives: Members realized that the skills that were being learned and practiced in the workshop were not only useful for the workplace, but could be equally applied in personal and other business related situations.

Applying the ARL principles


Participants were introduced to and experienced the ARL principles. One of the underlying ARL principles is that of accessing the "tacit" knowledge that exists within the individual through ongoing


reflection and sharing. A second underlying principle is "social learning", the recognition that learning takes place within a context — with other individuals, within the framework of their organization and "Facilitated learning", which happens through the support of facilitators who bring a variety of skills, tools and interventions. Other principles used for the design were reflection, relevance, and connecting with each other in a more integral way. These principles served as the foundation for the skills and tools which were introduced during the workshop.

The workshop was truly a memorable experience full of discovery and one which strengthened the connections and relationships among the team members, and generated their best practices in developing and sustaining relations with customers. This workshop demonstrated the power of the Action Reflection Learning (ARL) principles and process in tapping into the workforce talent and energy towards building customer intimacy. The workshop supported the Company's ongoing quest for differentiation. The company subsequently conducted the same workshop on their own for the rest of the organization. Today, one year down the road, the Company is performing at its peak.

In the words of one participant, "The power to generate solutions lies in each person. Every sales person has the capacity to make a difference in the marketplace creating customer intimacy." 

[\[1\]](#) For more about the Peer Group Coaching process, see www.limglobal.net/readings/96.html.

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Editor: Isabel Rimanoczy
Editing Support: Tony Pearson
21205 Yacht Club Drive, Suite 708
Aventura, FL 33180, USA
Ph/Fax: +1 (305) 692-4586
E-mail: newsletter@LIMglobal.net
<http://www.LIMglobal.net>

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