

## Field Coaching Report

**To:**

**From:** Tony de Melo

**Date:**

XXX, thanks for letting me work with you yesterday. It was good to see how you are doing and how you are making progress in your territory.

### Field Visit Comments

While working with you, you were able to show me how you divided up your doctor list and the progress you have been making getting around to seeing providers. You seem to have Salesforce down and can complete visits and bimonthlies successfully. We discussed working on your routing and sticking to it, so that you schedule appointments in the correct weeks moving forward.

I was able to observe how you are interacting with the office staff and providers you are visiting. The two appointments we had were very good. You seem to know your materials well and can detail effectively. We discussed trying to be a bit more conversational by just asking more questions and spending more time on the needs analysis. The more you ask questions and find out what the provider is currently doing and thinking the more you can focus on what you actually need to cover. This might identify that you don't have to cover as much as you originally thought.

In writing call notes, we discussed, writing more content down on what you learned during the visits. This will serve to remind you of what you learned for next time. This way you don't have to repeat things and you will know what to focus on in subsequent visits. Also, try to write down more of what you covered during each visit, so you know what you did. Also, don't forget to get a commitment from the providers and follow-up to ensure they are doing what they committed to. Try to always start your subsequent visits to confirm they are doing what they said they would before you move on to new content.

### Observations

#### **Strengths:**

- Preparation for each day and visit
- Salesforce data entry and submission

#### **Areas to Develop:**

- Creating a territory routing plan/schedule
  - This will help you navigate the territory more effectively and keep you on a consistent schedule.
- Writing more effective visit notes
  - As discussed above, just write down more of what you learned as part of your needs analysis, what your actions were and content you covered, then any commitments you received and finally what you are going to follow-up on.