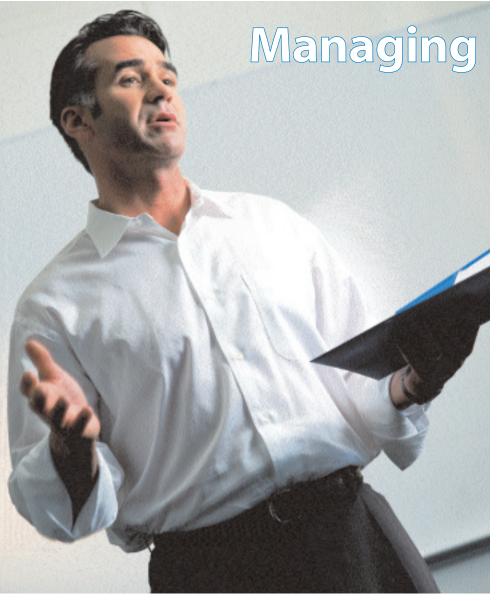
BY ELISABETH PENA

# COACHING Developing a Playbook for Sales Rep Success



human and financial resources **challenges** even the **best sales managers**.

harmaceutical sales managers need to be taught how to hone their own coaching and counseling skills, as well as have a clear corporate direction to understand what is required from their people. An array of tools exist to help them to improve performance. Given the right coaching, the coach or manager can help develop a top-notch sales team.

Training programs for pharmaceutical sales reps are a basic requirement. This is something all companies accept and embrace. What differentiates a successful salesforce from an average one, however, is the quality of the training that the sales manager receives. Coaching reinforces training, guides performance, ensures alignment between selling practices and the organization's business strategy, and helps the sales staff to adapt various teachings to their specific selling challenges.

The pharmaceutical industry increasingly recognizes the need to provide management development programs that enable managers to coach their sales teams effectively. According to the Society for Pharmaceutical and Biotech Trainers (SPBT), on average in 2002, new district managers received nearly four work weeks, or 19 days, of training during their first year, compared with 12.5 days of initial manager training in 2000.

Managers must be well-versed on myriad topics ranging from PhRMA marketing guidelines, OIG regulations, and HIPAA, in addition to their already heavy training agendas, which include conveying product knowledge and skills, going on calls with reps, role playing, and managing mentoring programs.

## **COACHING** techniques

If companies are not paying attention to the substantially different skill sets required to be a successful manager, as opposed to a successful representative, they are missing a major opportunity. The skills and capabilities that made someone a great salesperson are only partially the same skills and capabilities that make a great manager.



▲ Sales managers rarely receive coaching from their own managers and they rarely ask their team to rate their managerial abilities. Perhaps most importantly, managers are not given the tools or the direction to apply their training on the job. As a result, anything learned in training is frequently abandoned shortly after the training event.

Experts agree that if companies "coach the coach," improved rep performance will follow.

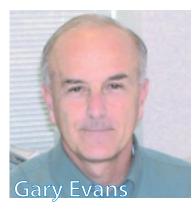
## **Model Behavior**

"One of the first steps to effective coaching is identifying the different types of sales reps," says James McAlea, VP of sales at Brennan Sales Institute.

He says sales reps fall into three general categories: heroes, reps who go beyond the call of duty; average, those who are striving to be heroes; and nonaverage, those who may or may not have the ability to do the job. Mr. McAlea



▼ We give newly promoted managers individual attention and spend several days with them running through our coaching model and new manager orientation. New managers often focus on all the paperwork that has to be done, as opposed to what they really should be doing spending time in the field with reps.





▲ Most companies offer new managers training on coaching and managing, such as effective manager competencies. But beyond training, it's also important for a new manager to have a top-notch mentor.

also notes if managers are to develop effective coaching techniques, they need to recognize that within any team there are four behavior types: able but unwilling, able and willing, unable but willing, and unable and unwilling. By identifying these behavior types, managers can determine not only where to focus their efforts but also the coaching method that will be most effective to retain the heroes and boost the performance of average reps.

Experts have identified different coaching tactics and methodologies to help sales managers coach and train their salespeople. Mr. McAlea says the two coaching methodologies his compa✓ A sales manager's customers are his or her reps. Managers no longer sell; their job is to develop their representatives to a higher level of selling competency; that is their primary job.



ny has identified are collaborative and dictatorial. The collaborative coaching style involves a manager and his or her reps working together as a team and creates a path to success. Managers using the dictatorial style tend to dictate rules and tips to their reps, a practice that reps can interpret as overbearing and domineering.

"Collaborative coaching is internal; dictatorial is external," Mr. McAlea says. "With the collaborative approach, reps continue to use the skill sets that the team has practiced even after managers leave the territory. With the dictatorial approach, reps may discontinue using what they have learned. Managers have to know when and how The biggest challenge we face is delivering quality training programs in a fairly short timeframe. The marketplaces are constantly evolving, and sales messages change accordingly. With every change that takes place, a trainer has to fully explore what that change is, how it impacts the market, how it could potentially impact a product, and develop a means by which to train the field in a timely manner so representatives are better prepared than the competition.





We have noticed that there is

a **tremendous** move in the industry to find **outside vendors** that can provide the content and the tools to **effectively train** salesforces, especially in the area of compliance training.

to appropriately use dictatorial coaching when necessary."

James Ecker, senior manager, commercial excellence leadership and learning, at Genentech, says the most effective coaching methods are those that are agreed upon by both the sales manager and the rep.

"When managers are developing the coaching tactics they plan to employ, they need to put themselves in the shoes of the salesperson so they are in the process together," Mr. Ecker says.

Collaboration between a manager and a rep is a key element to many coaching methodologies. Seleste Lunsford, senior product manager at AchieveGlobal, believes managers should use a collaborative feedback model when talking with their reps.

The value of a manager is in knowing more about the organization, culture, and standards of the company than the rep does and helping the rep understand those resources so he or she becomes confident.



"Instead of a directive approach, such as 'here is what you did wrong and here is what you should do better,' the coaching should be more collaborative," Ms. Lunsford says.

She suggests managers ask reps questions about how they think a call with a physician went and what, in hindsight, they would like to have done differently. Such an approach will enable the manager and rep to develop a collaborative approach to improving performance.

Another coaching approach is a situational management model where managers identify the specific developmental stages of each rep for any given task.

"Managers may have an instinct that they need to intervene with a person in a direct and elementary way, while other reps may be doing well on their own," Mr. Ecker says. "Conversely, managers are torn by the belief that they should give everyone equal time."

The situational model used at Genentech encourages managers to shake the tendency to coach each rep the same way.

"Managers don't treat star performers the same way they treat their new people, and that is fine," he says. "This is an approach that recognizes that people have different needs based on where they are in the manage-

ment model."

According to Carl E. Wooten, director of sales training and development at Sepracor, his company uses a coaching quadrants model, which helps managers to determine what level of job performance their direct reports are achieving and how to support that performance through focused coaching sessions. Individual achievement levels directly correlate to the level and amount of time a manager will spend coaching and supporting.

"For example, an able and willing representative may not require as much coaching time as a representative who is willing but unable," he says. "The coaching approach is always based on assessing three areas; knowledge, skill, and behaviors. The coaching focus is on the gap between what is required versus what is actually being observed."

At MedPointe, a behavioral job description and a behavioral coaching guide are employed. According to Gary Evans, VP of field sales operations at MedPointe, this approach uses specific feedback based on each individual part of a coaching model as opposed to making general statements, such as telling a rep he or she needs "to close stronger."

"Most reps don't know what that general comment means," Mr. Evans says. "In our coaching we are very specific in what we tell our reps."

Mr. McAlea points out that a manager's time is often consumed by his or her underperforming reps.

"Managers are spending much of their time trying to convert nonaverage reps into average," Mr. McAlea says. "This is can be very difficult and sometimes not achievable. Their time can be better spent developing the average reps into heroes and retaining their heroes."

Mr. Evans concurs. "A manager should spend extensive time with all of his or her reps; all too often the high performing representatives are forgotten and the majority of the manager's time is spent with representatives who are in need of help," he says. "One shouldn't walk away from the reps who are in need of help but managers need to balance their time. Substantial business can be generated by spending time with the employees who are the most effective."

## Answering the Call

Central to the manager's role as coach is to guide and direct the rep through account planning, sales negotiations, sales presentations, and call preparation.

One key method is to go out with a rep on a call. But without appropriate precall planning, managers may encounter pitfalls that diminish the value of the coaching experience. According to Ms. Lunsford, managers should have a game plan before going out on calls with reps. By telling the rep in advance what the focus of the day's calls will be on, the rep and the coach can effectively discuss the components of the sales call.

"Managers should focus their coaching on specific items, such as 'today we are going to concentrate on the types of questions you ask the physician,'" she says. "This way the manager doesn't overwhelm the rep. If a manager hasn't prepared for the coaching session and doesn't have a standard in mind, he or she will observe the salesperson and then dump 100 observations on that rep."

One of the pitfalls that many sales managers fall into while on a call with their reps is taking over the call. A successful coach or manager allows the rep to complete the call without interruption. A sales manager may feel pressure to close the sale, but if he or she steps in and takes over the call there is no way to evaluate whether the rep has the necessary skills.

"When this happens the manager winds up either demoralizing or minimizing the value of the rep," says Jim Trunick, director of corporate sales training and education at Allergan. "Younger managers, in particular, feel compelled to step in and do the work during a sales call that many times a rep could do. Managers need to back away from being too vocal."

Mr. McAlea identifies this as a key coaching problem and one that stems from a lack of precall planning.

"The biggest difficulty any manager has as a coach is keeping quiet on the sales call," Mr. McAlea says. "Because managers are under severe pressure to grow market share, if they perceive that the sales call is not going well they jump in and take the call away from the rep in front of the doctor. If that occurs, the rep may lose confidence and the necessary learning will not take place. As an example, if a star quarterback is pulled from the game and the coach goes in as his replacement, who wins?"

To avoid this, the sales call can be rescued by effective precall planning between the manager and the rep. Successful managers and reps should create cues during the precall plan to indicate the need for help during a call and avoiding losing credibility or creating confusion with the physician.

"Managers can preplan a cue for any time a rep needs them to step in as a technical resource, such as, 'Jim, please share with me your thoughts on what the doctor just said," Mr. McAlea says. "Managers can give their thoughts and then jump right back out."

This collaborative effort best uses the managers' experience, skills, and knowledge, while allowing the rep to grow as well.

According to Brian Fagan, executive director at the Society for Pharmaceutical and Biotech Trainers, to be effective coaching should be oneon-one, never in front of a customer. And the focus should be on the behavior related to work performance, not on personality.

## The Trainer's Toolbox

Managers can coach and support their staff through a variety of tactics and tools.

James J. Miller Jr., director of sales at HCPro, believes that role playing is the most effective technique in a trainer's toolbox.

"When people are in a position where they can touch it, feel it, and get more of their senses involved, this makes the exercise more effective in getting the core message to the reps," he says.

Practice through simulation and peer coaching are other valuable training functions that Michael Capaldi, director of curriculum planning and development at Sanofi-Synthélabo, finds valuable.

"Sales reps benefit from hands-on coaching from a trainer in a simulation environment," he says. "Getting feedback from peers based on what was observed in the training function is really important. During practice in a training environment, participants can try new techniques and skills and receive coaching at the same time."

Mentoring programs are another training technique managers employ with their reps. Eric Bolesh, senior analyst at Cutting Edge Information, says managers need to be careful when using this tool because it requires an indepth knowledge of their reps before matching them up with a mentor.

"Because work styles, backgrounds, and work ethics differ, some managers have had negative experiences with mentoring programs," he says. "This is a high turnover profession, and if a rookie rep is paired up with a veteran rep who is looking at greener pastures, then that rookie's experience is tainted."

Updates and reviews of changing OIG and PhRMA code guidelines and regulations also can be a valuable part of a trainer's toolbox. Mr. Miller says it is the responsibility of a trainer to turn this type of training into a sales advantage.

"Instead of just interpreting the guidelines, the best way to handle compliance training is to show the representative how the knowledge provides a sales advantage as opposed to making compliance a 'no-no-no' type of training," he says.

New regulations also are pushing managers to place greater emphasis on product knowledge, Mr. Bolesh finds.

"If reps can present a broad base of objective

information about a therapeutic area, disease state, or a class of drugs this goes that much further toward building trust with their physicians," he says.

Positive feedback is an important element in any teaching situation. Oftentimes, however, time constraints result in this key training technique being forgotten.

"When there are only brief opportunities to have sessions, sometimes managers forget to convey positive information," Ms. Lunsford says. "All coaching sessions should not be negative. A manager has to make sure that reps know that they are making progress in some areas."

"Positive feedback always needs to come first," Mr. Evans says. "A manager needs to first tell reps what they are doing well and what they should continue to do. Then a manager can tell reps what they need to begin doing and what they should stop doing."

By delivering positive feedback, managers also gain insight into a sales rep's strengths. According to John Riggle, manager of primary training at Sankyo Pharma, when coaching a sales representative, the most important information a manager can convey is where the rep's strengths lie.

"Every representative is different and each has the capability of being a top performer in the field," he says. "We try to reinforce what they do right in terms of role playing and then pick one area at a time for improvement. If we try to change representatives into something they're not, it will be apparent to the physician and credibility will be lost."

Recognizing specific talents that an individual possesses and then encouraging the rep to incorporate these attributes into a presentation, along with established selling skills and promotional messaging ensures that the sales rep is recognized as an individual, which leads to increased access to physicians.

The most basic tool a manager can use when coaching and training is leading by example.

"Effective coaching involves a certain amount of 'show and tell," Mr. Fagan says. "That means managers need to know themselves and their style as a coach, as well as understand the strengths and weaknesses of the individual they are coaching."

## The Five Pillars of Coaching

### **SPEAKING STRAIGHT**

Managers need to speak straight to their representatives. By correctly assessing the situation and giving accurate feedback, managers can enable the representative to improve on every call. Focusing on the development of the rep's skills, managers will know how to: show respect, be sensitive to the delivery of their information, and gain commitment to move the learning process forward.

In addition, managers need to learn how to balance the importance of showing empathy and interjecting their own experiences to add value without taking the emphasis away from the representative's development and focus.

### **COACHING DIFFERENT BEHAVIORS**

Managers need to learn how to use a common language with collaborative and dictatorial coaching methodologies to motivate and develop the four different behavioral types — willing and able, unwilling and unable, willing and unable, unwilling and able. Also, managers need to learn how to accurately assess their staff's behavior types to determine how to collaboratively coach in the field and develop specific plans of action for skill development.

#### **BEING THERE**

Managers need to be able to support both the successes and failures of their representatives. By displaying extraordinary commitment, managers can learn how to build a team and generate trust among team members. Managers need to know the importance of providing rigorous support, dealing with direction regarding uncomfortable issues, and confronting poor performance issues. A good coach knows how to praise an individual's strengths and teach an individual how to offset his or her weaknesses. This helps in the development process and enables managers to assist their reps to move up or move out.

## HONORING COMMITMENTS

Commitments are a two-way street between the manager and his or her teammates. Without commitments, no one person can achieve the established goals. Both parties must hold each other accountable to the commitment. The rep needs to learn the difference between a declaration and a commitment and a manager needs to learn how to hold an individual accountable.

### **LISTENING GENEROUSLY**

Listening is more important than talking. Managers tend to talk actively rather than listen actively to their reps/customers. In addition, automatic filters often cloud expectations and create prejudices and beliefs. Listening actively means listening for the speaker's contribution.

Source: Brennan Sales Institute, Upper Darby, Pa. For more information, visit brennantraining.com.

## **COACHING** techniques

## The Making of a Manager

As with most business situations, time is the

greatest constraint in the coaching and training of sales representatives. Striking a balance between the sales representative's time in the field and in the office at training sessions and meetings is compounded by the manager's struggle to balance coaching and performing the myriad administrative duties his or her position requires.

## Sound Bites from the Field

## **Tactics from the Trainers**

PHARMAVOICE ASKED EXPERTS IN SALESFORCE TRAINING WHAT COACHING TACTICS ARE MOST EFFECTIVE FOR SALES MANAGERS TO USE WITH THEIR SALES REPRESENTATIVES.



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Managers who are coaching in the field should focus on the opportunities that the rep may have missed by listening to subtle clues from the physician. For example, relay back to the rep opportunities that might have been missed based on a comment from the physician to share clinical information, or an opportunity where the rep could have asked the physician a question that could have provided more time to share product information. In a training environment, it is important to drill home the clinical information, but it also is important to give reps practice in sharing this information in a conversation. It is one thing to know a study; it is another to know when to use it, and how to use it appropriately and within compliance.



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The sales call is an opportunity for sales managers to not only model the behaviors they expect of their salespeople, but also to provide an appropriate level of support that helps the salesperson improve his or her skills. Managers should observe the salesperson's behavior and his or her impact on the customer; stick to the call plan; include the salesperson when talking through gestures, eye contact, and verbal references; acknowledge the salesperson's role in, and contributions to, the account; make sure the salesperson's role is significant and clear to the customer; refer questions and topics to the salesperson as often as possible; and use 'we' rather than 'I' as much as possible. Managers should not interrupt the salesperson unless it is absolutely necessary; raise topics with the salesperson that he or she is not expecting or ready to handle; let the salesperson continue with inappropriate behavior; let the salesperson struggle when he or she is having difficulty with a situation; or take over the call.



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<sup>11</sup> The most effective sales managers consistently do two critical things. First, they focus on only one trait at a time with each rep. While performance appraisals and multirater surveys inevitably offer a long list of 'areas for improvement,' good coaches know that it's best to focus on one thing at a time. The second thing is they show 'what good looks like.' By modeling the desired behavior in real selling situations, managers gain instant credibility with their reps and are able to demonstrate the desired outcomes.<sup>11</sup>



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trainingmakescents.com.

Effective coaches ask powerful questions —

questions that invite reps to raise their level of awareness and increase the likelihood that they will take responsibility for their actions. An example of a powerful question could be, from your perspective, how effective was your opening to the call? Sales managers who coach well help to deepen the learning for their representatives so that they really see the impact of their actions. The sister skill to asking questions is listening. Managers need to be able to listen to what is being said, how it is being said, and what is not being said.



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information, visit greatcirclelearning.com.

<sup>11</sup> There is a significant difference in how managers coach a new rep versus an experienced rep. For new reps, the experience should be more focused on classic drill and practice techniques. At the higher end, the training experience should use more mentoring techniques, involving dialogue and story telling. The nature of the outcome and its critical severity also must be considered when choosing the appropriate learning method. To risk an account by allowing a discovery based, 'do what you think best then we'll discuss how it could have been better,' approach may not be appropriate.



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for pharmaceutical and biotechnology companies, and professional medical associations. For more information, visit healthanswersinc.com.

Reps need self-evaluation tools since they are on their own 95% of the time. A successful manager/coach will teach reps to develop actionoriented objectives, focused on a desired behavior outcome from their physician customer. By asking reps to verbalize their self-evaluation, the

## **COACHING** techniques

"Managers must attend to other demands, such as administration, corporate meetings, and so forth, all of which detract from running the business and the development of their people," Mr. Fagan says. "When managers don't have enough time to coach, they become supervisors, not managers. The performance of an organization is dependent upon the performance of individuals. When individuals are allowed to grow and develop, so does the entire organization."

Many of the problems sales managers

## manager can give support, input, and advice as an effective way to develop good selling skills.



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Proactive and follow-up coaching should be used in tandem to be most effective. This requires helping reps understand effective precall planning, product positioning during the call based on the precall planning, feedback on the call, and suggestions for what could be done better next time. This type of coaching, done on a one-on-one basis, is very effective because it can be delivered in real time.



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In the classroom, role playing is critical to the retention of learning. If the representatives are able to use these techniques within a 24-hour to 48-hour timeframe, they will have greater retention. Accelerated learning has proven that hands-on training is the most effective when the experience appears real. In the field, the most effective techniques are based on the individual's comfort in receiving feedback. Establishing guidelines and dialogue around the sales rep's preference for receiving feedback would save a lot of anguish and frustration on behalf of the manager. Understanding the differences in gender communication is another factor that will determine the success of a coach.



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Specific coaching tactics must vary based on the individual sales representative and his or her learning style, needs, and personality. There is no one 'correct' coaching method that's right for everyone. Most reps benefit from a combination of tactics and tools.

## **Technology's Role in Training**

## PHARMAVOICE ASKED EXPERTS FROM E-LEARNING COMPANIES IF TECHNOLOGY TOOLS ARE REPLACING THE ROLE OF THE COACH.



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Technologies enhance the role of the coach because they can more effectively optimize interactions. By using blended learning, a sales rep can be trained more quickly through prerequisite online courses. Coaches also can use technology to conduct virtual meetings using synchronous tools. With performance management tools, coaches can become part of the process to assess competencies and comment on achievement of goals. Coaches can use analytics to see how their reps are doing compared with other reps in terms of driving revenue. These data give the coach the tools to help the sales rep in a realistic business environment.



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The use of technology strengthens the sales trainer's instructional toolbox with online programs, CD-ROMs, Webinars, etc., for a true blended learning approach. But technology should not be considered a replacement for the coach.
E-learning helps build a strong, instructional foundation, engaging all the learning senses, ensuring active participation to enhance knowledge retention. The role of the coach, however, always will be essential in building on that foundation. Effective coaching helps sales reps

enhance their communication skills, fluency, and competency in addressing complex questions and handling challenging situations.



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systems for the pharmaceutical industry. For more information, visit pedagogue.com.

Technology-based training will never replace person-to-person mentoring and coaching. While e-learning is extremely helpful for imparting knowledge and providing some application-based training, the human elements of personalized evaluation, context-based understanding, and one-on-one storytelling — both successes and failures — cannot be replicated by technology. Computers cannot motivate, sympathize, encourage, challenge, or set an example. experience when coaching sales representatives are rooted in the training, or lack thereof, that managers receive when they start the job.

Managers often are successful sales representatives who have been promoted to a managerial role. But training experts say the skills that made a sales representative successful in the field are not the same as those required of a good manager.

"The lack of adequate training for sales managers is an area of weakness in the pharmaceutical industry," Mr. Miller says. "Not enough time is spent on giving managers adequate training as they come up through the ranks. Sales representatives who were successful at what they did during their tenure in the field may not be as successful when they are promoted to district manager and have to relay a message to 20 representatives under new guidelines and regulations." The pharmaceutical company representatives with whom PharmaVOICE spoke for this article say they provide newly promoted sales managers with initial coaching and management training ranging from one to two weeks, with a subsequent training session at the sixmonth or year mark.

Experts believe that sales-management training needs to be embedded as part of a company's overall system rather than as a one-time event.

"There is a challenge in terms of ongoing training for sales managers, because they are required to do so many things and have so many people to coach and observe," Ms. Lunsford says. "With all the things that they have to do from an administrative perspective, it is hard for them to make the time to participate in ongoing training."

If coaching is not part of a company's culture or how managers are accustomed to operating, then those managers will not be as conscientious about providing their sales representatives with good coaching.

Ms. Lunsford points out that there is a difference between what a manager considers to be coaching and what a salesperson might regard as coaching. A salesperson may be looking for help on an account or to close a sale. Managers might view coaching as any conversation that they have with their reps.

"Managers may think they are spending more time on coaching than their salespeople actually perceive because of the differences in what each thinks coaching means," she says. "But there is probably not a sales manager out there who would say they believe he or she is doing enough coaching." ◆

PharmaVoice welcomes comments about this article. E-mail us at feedback@pharmavoice.com.

## Experts on this topic

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