Part 4 - Effective Training

Awaken the zombies and help them achieve "level 3" understanding

I'll never forget the look on my colleagues' faces as they trudged into the first eight-hour "train-the-trainer" sales and marketing code session we conducted for our European regional and country managers at Bausch & Lomb. As they took their seats in the training room, they appeared like condemned prisoners resigned to their retched fate. I could hardly blame them.

There are few cures for insomnia more potent than a good old-fashioned compliance and ethics training session. Mind numbingly boring topics like those addressed in sales and marketing codes of conduct consistently anesthetize all but the most caffeinated. Even the hearty souls who manage to keep their eyes open soon become inattentive zombies with glazed looks and minds wandering to places they'd rather be. This is particularly true of sales and marketing professionals who are accustomed to being constantly on the move.

However, by the end of the day, my European colleagues uniformly reported that the training session was not just tolerable but the most engaging and effective corporate educational program they had ever participated in. Following that first session in Amsterdam, we replicated these results with hundreds of other Bausch & Lomb executives and business professionals in Hong Kong, Singapore, New Delhi, Newport Beach California, Rochester New York, Madison New Jersey, and Dallas Texas. My two colleagues and I who executed this back-breaking tour de force considered, but never printed tee shirts chronicling our travels. What follows is a description of the innovative training techniques we used at both Bausch & Lomb and Carestream Health to not only keep our colleagues awake but also help them achieve a "level-3" understanding of the sales and marketing codes.

Framing

There is a natural and predictable reaction whenever you seek to impose constraints on sales and marketing professionals, and it's not a favorable one. Rightly or wrongly, sales and marketing professionals view compliance officers as people holding up big stop signs who needlessly complicate their already stressful lives.

When introducing a sales and marketing code via live training, it's important to confront this mindset head on. At Bausch & Lomb, we did this by kicking off every training session with a rock video we produced of Formula One cars whizzing around the track. As the music blared, exciting scenes from inside and outside the cockpit appeared along with our team's messaging that boiled down to the following three observations:

1. We're all part of the same team and we want our sales and marketing professionals to "drive" faster than the competition;
2. The sales and marketing codes enable faster driving because they help us see the road ahead and hazards on the course; and
3. We can't win the race if we "go off the road."

Following the rock video, we had a direct discussion with the training participants to drive home the message that we are not "police men." Instead, we are part of the race crew dedicated to help them be the most effective and successful sales personnel in our industry. We also got their senior leadership to deliver the following vital message:

> Mastering the rules associated with marketing medical device and pharmaceutical products is not just a nice thing to do, **it is an essential job skill no less important than knowing your product line and your customers' needs**.

Level 3 Understanding

As my civil procedure professor, Ed Hawkney, explained to my fellow first-year law school classmates and I, there are three levels of understanding a rule. Level 1 is a general awareness that there is a rule. Level 2 is an understanding of what the rule says. Level 3 is understanding how to apply the rule in the real world.

The difference between Level 2 and Level 3 understanding is vast. It is the difference between merely knowing how to move chess pieces on the board and knowing how to play the game well. To help your colleagues see and avoid the Bear Traps when they are interacting with HCPs, healthcare institutions and government officials, it is essential that your training programs seek to help them achieve a Level 3 understanding of your sales and marketing codes of conduct. What follows is a description of how to get this done and it starts with keeping them awake and engaged in the learning activity.

Engagement

As a trial attorney, I learned a valuable lesson that I've carried with me ever since: You can't persuade a sleeping jury. Job one in any training session is to keep the participants awake and fully engaged. At Bausch & Lomb and Carestream Health, we used several techniques to do this. First, we condensed each section of the code to single "Can do/Can't do" slides. Each of these slides was followed by a "knowledge challenge" regarding the subject matter covered on the previous slide. Participants responded to each knowledge challenge question using audience response devices that gave immediate feedback regarding the number of participants who got the answer right or wrong. If one or more trainees selected the wrong answer, we would use that as an opportunity to discuss the rule once more to ensure understanding. In addition, throughout the training session we would intersperse recitation of the rules with probing questions to the trainees about how to appropriately apply the rules in various circumstances they're likely to encounter on the job.

Another technique we used to engage our colleagues and to enhance training effectiveness was to get the participants into the act. Prior to the training session, we recruited some of the trainees to be presenters. We simplified this task for them by sending them "can do, can't do slides" in advance with teachers notes. We instructed them to present the rule, tell why following the rule is important for our business and provide a specific example from their personal experience applying the rule. In so doing, we reasoned that the best way to train the trainers was to have the trainers develop these skills by training each other.

This technique worked brilliantly. Instead of listening to compliance professionals drone on for hours about the rules, we injected energy and levity into the proceedings by essentially playing master of ceremonies soliciting enthusiastic applause as each presenter took and departed from the stage. As mentioned above, each can-do can't do slide was followed by a knowledge challenge question that the trainees would answer using their audience response devices. To spice things up a bit, we characterized the percentage of correct answers as the presenter's "grade" as a trainer. After the first presenter, a friendly competition ensued between the trainers to get the best score. These presentations comprised the morning session.

Following lunch, we pivoted to a scenario-based learning activity. We split the trainees into several small teams and provided them ten realistic scenarios that they were likely to encounter in the field. The teams were asked to use the code to identify the applicable code section(s), describe the correct course of action, and provide the reasoning for their conclusion. When the teams completed their work, we engaged them in a friendly competition during a report-out session to see which team got the most answers correct. We found that, even though the points didn't count for anything, such competitions unerringly induce trainees to become totally engaged in the learning activity.

Such scenario-based training has multiple benefits. First, it gets sales and marketing professionals to engage in the unnatural act of actually reading the code to find answers instead of winging it. Second, it improves participants' Bear Trap awareness. Third, it helps the trainees to achieve a Level 3 understanding of how the rules apply in circumstances they are likely to encounter on the job.

Next, we administered a ten-question written examination to all attendees. We deliberately drafted questions that were both realistic and challenging. We reasoned it was better for trainees to make mistakes in the classroom than in the field. The tests were graded collectively using the audience response devices that showed the percentage of participants who selected the correct and incorrect answers. If some participants selected the wrong answers in response to a test question, we used that as another teaching opportunity to help our colleagues understand the rules.

We closed each training session by introduced participants to a comprehensive set of training materials we developed and translated into multiple languages that they could use to duplicate a shorter version of the training we provided them to the colleagues in their countries. These materials included slides with detailed teacher's notes, scenario-based exercises, knowledge tests, sign-in sheets and an implementation and training guide. We also provided detailed guidance regarding expectations for country managers to develop and implement internal controls in their territories required to implement the codes.

The rationale behind this train-the-trainer approach we took was that our small compliance department did not have the staffing or the language skills to perform live training to all our sales and marketing personnel around the world. Nor did we have a corporate training department that could take on such a responsibility. Moreover, we concluded that the most effective way of driving home the importance of the codes would be to have company leaders delivering that message directly to their teams.

Preparation, Stage Craft and Energy

As may be obvious from the description of the training techniques above, success requires careful, detailed preparation. Make sure you prepare scenarios and knowledge challenges that are relevant and well-written. Purchase and master the use of audience response device technology. Arrive at the location early to make sure the sound systems and technology all work long before the trainees arrive. And show respect to the trainees by starting and finishing on time.

It’s also important to recognize that effective live training is a performance art. It requires stage craft and an energetic performance. If you play law school professor, you will lose the audience in the first five minutes. Be professional but think “P.T. Barnum” rather than “lecturer.” Also, be mindful of your pace and keep things rolling along at a good clip. By taking these steps you will exceed low expectations and delight rather than torture your colleagues.

Regardless of your training program’s effectiveness and of how conscientious and well-intentioned your colleagues are, rigorous compliance auditing, monitoring and assistance will be required to ensure the seed you plant with your codes and your initial training program grows and flourishes over the long term. This will be the focus of Part 5 of this series.