



Coaching Report of:
Mr. John Chacko, Associate Director - Business Development
S C Research Center

August 14th 2014

John Chacko

Associate Director - Business Development
S C Research Center

Introduction

John Chacko (hereinafter referred to as 'John') is an Associate Director, Business Development. He has been working with S C Research Center for over 2 years. During a discussion in the month of March between Dr.Badri and Arjun Raj Urs (hereinafter referred to as Coach) John was identified to go through the Coaching.

Key Challenges and Coaching Objectives –

In one of the earlier meetings in December 2013, Dr.Badri had expressed that John did possess some technical knowledge and skills to do the task, however John had not even closed an order in the last 3 months and has performed at minimum or acceptable standards. Some of the attributes that were contributing to this lack of performance were considered to be:

- Lack of confidence, ability to understand, how to present yourself to the customer
- Goals and objective, long rope to try
- Not pressurized to build customer; build relationships.
- Stop working things of least important
- Build confidence ability to deliver
- Has moderate understanding of desired outcomes and task requirements
- Has trouble in generating alternatives to this goal or task
- Has difficulty managing time well and sometimes fails to meet deadlines for task accomplishment for this goal or task
- Is sometime insecure about making decisions and solving problems on own

Apart from the above John is generally willing to take responsibility but can be nervous about making mistakes; Occasionally John is reluctant to take responsibility, withholding back energy and effort because of some job-related or non job-related issue.

Dr.Badri further shared that John is enthusiastic about his goal or task but is also dependent on others for evaluating his or her work and for feedback. With this background the coaching was undertaken to ensure John is able to achieve the goal set for him during his visit to US while Dr.Badri would take stock of the progress during alternative week.

An initial thinking pattern assessment revealed that John had the tendency to react rather than think ahead which also suggests that he resists being structured. John's motivational level indicated fluctuation with the tendency to be motivated one moment, unmotivated the next. When criticized strongly John has the tendency to lose focus. John also seems unclear about what is important in life, what values mean to him. Though he seems to have some idea but does not seem very clear. The

assessment also indicated that John lacks a sense of urgency when it is better to push ahead.

Overall strengths

John was known to be having good interpersonal skills and has been usually effective in communicating with others about goals or task. John has the ability to take initiative in meeting new prospects.

Some of the strengths identified from his thinking pattern profile assessment indicate that:

- John has ability to read people, situations well by “gut feel”.
- John looks into a situation and sorts out the critical issues, looking through the details, properties, parts and steps.
- John stays in touch with what is happening, has the ability to measure it and also to take action when necessary.
- John has the ability to be flexible, to make up structures and meanings that fit the situation
- John has the ability to motivate oneself to improve
- John has the ability to keep from being overconfident, to be open to input and change
- John has the ability to be patient and wait things out

During the process of coaching it was observed that John was open to receive perceptions and views, which was vital for him to be Coachable. As the thinking pattern suggested that John has the ability to motivate oneself to improve, this was backed by his urge to succeed and prove all of which suggested that John has high need to be successful. John is also willingness to explore new ways and opportunities.

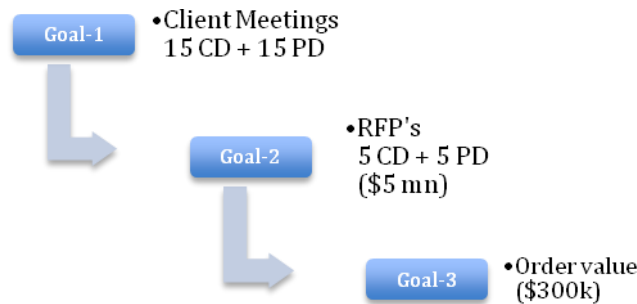
Process and Strategy for Goal achievement:

John along with the coach developed a road map for the goal at the very first meeting. The Goal was further divided into 3 sub goals. This step helped in identifying the areas that John would need to concentrate. John was made to realize 'why to accomplish a particular Goal' before a process could be drawn out. A 3 step process of clarity, focus and execution were adopted for each of the Goals. The process and strategy is more fully described in the table below:

Goal \$2 million order value for 2014-15 (\$0.3 mn in quarter 1)		
Goal – Clarity		
Goal-1	Goal-2	Goal-3
A. Meet atleast 15 clients from US for CD by June 30 th 2014 B. Meet minimum 15 clients who do not have in-house capability for PD by June 30 th 2014	Generate 10 RFPs (5 CDs and 5 PDs) by June 30 th 2014	Signing a contract worth minimum \$ 3,00,000 by 30 th June 2014
Goal – Focus		
<ul style="list-style-type: none"> ➤ Take stock ➤ Qualify the prospect ➤ Exploration ➤ Understand the requirement ➤ Position the company as value contributors ➤ Assure the prospect ➤ Generate interest for RFP 	<ul style="list-style-type: none"> ➤ Past success docket ➤ Documentation of prospect's requirement ➤ Feasibility [molecules, regulatory, operation challenges (patients for study)] ➤ Cost estimation ➤ Preparation of the proposal ➤ Submission ➤ Follow up with client for logical closure 	<ul style="list-style-type: none"> ➤ Past success docket ➤ Client feedback on RFP ➤ Evaluate client feedback ➤ Bridge the gaps – (understanding of the cost estimate, what are the services considered to be executed by us, task ownership, payment clause, agreement to the contract) ➤ Build value proposition (Bid difference) ➤ Negotiation ➤ Sign off ➤ Collect payment of the signing amount ➤ Celebrate
Goal – Execution		
<p>Each session was to last for an hour to 1½ hour. A context was set at the beginning of each session and an insight at the end of the session was recorded. This is documented in Annexure-A</p> <p>The deviation and set back to each goal was considered during the session. John was given direction, orientation and encouraged to develop alternatives while executing strategies and move towards the goals.</p> <p>Each of the Goal was identified by a wow statement. Every session a relationship with the Goal and the movement towards its achievement was established. This is documented in Annexure-B</p> <p>The order status as on 14th of August is available in the Annexure – C</p>		

Key benefits from coaching:

- a. **Focus** : begin with the end in mind if he had to get \$300k what can get that \$300k. Previous approach John would contact customers generate RFP's and these RFP's were expected to convert to orders. However the conversion of RFP was <10%.



This clearly indicated that there are two options.

- i. Either to increase the number of RFP's or
- ii. to improve the conversion (RFP to order) rate.

So the goal was stretched to get 20 RFP's instead of 10 RFP's.

- b. Qualifying the prospect - The prospects were qualified in five different categories. 1. Orders received, 2. Hot prospects, 3. Focus (keep in radar), 4. It has taken different shape, 5. Focus not needed as of now. This provided clarity on the method of prioritising customer base.
- c. Prioritisation – So much to do with so little time was John's concern when coaching began. Designed a method where John could prioritise his work and delegate back end work in India and take support from his colleague.
- d. Overcoming disappointment able to overcome setback and disappointment within few hours rather than carrying this over for days and weeks. For eg: 1) A personal tragedy when he landed in US. 2) Prospective order being lost.
- e. Awareness on building trust and value in prospects as well as reducing tension and risk.
- f. Inspired to think bigger than the set goal. Instead of focusing on smaller client base with larger order value he was motivated to increase the prospective clients base.
- g. Previously in 3 months visit to U.S he met 12 clients this time he is meeting about 30 clients. Meetings were set before he left for US which resulted in 14 clients being lined up with confirmation for the meeting and rest were met while he was at US.
- h. Smart working through referrals from internal workforce and the prospective clients.

- i. The coaching intervention provided a reinforcement and helped him to find alternatives in crisis or dead end situation. He was assisted in being assured in difficult and challenging situations.

Key take aways

John is able to see a potential of 3-4 million dollars in the next 1 year in U.S with his presence.

John's desire to continue to improve, to get better, and open to feedback/suggestions are things that will continue to serve him well.

The pull towards the goal bring intrinsic motivation rather than push which is more extrinsic and temporary.

The pull is a motivator as it addresses 'what's in it for me'

The pull is inspirational, more of fragrance remains even when the flower is removed from the environment

Coach observation & Recommendations :

- When the coaching began, John confidence was low on what could be achieved during the visit to U.S. Slowly it started shifting and by the end of the three months period his confidence soared and he was upbeat about accomplishing goals and doing well in the future.
- John will continue to do well, if he were to be given consistent focus and energy through coaching intervention. This will help him to constantly keep delusion, distraction, disappointments and distress away
- Organisation needs to look at giving one more resource to John who can support him to source and tap new clients. This will be handy once John is away at U.S.

Annexure - A

Summary of session wise context and insight shared during the discussion between Mr. John Prasanna and Coach Mr. Arjun Raj Urs

	Date	Time / Location	Context	Insights from the session
Session-01	03-Apr-14	3:00pm to 5:00pm S C, JP Nagar		<ul style="list-style-type: none"> - Wow statement that can energise me - Different steps to convert these goals - Success stories for the 2 goals
Session-02	10-Apr-14	1:50pm to 3:30pm S C, JP Nagar	Set powerful strategies	<ul style="list-style-type: none"> - Energising with wow statements for each goal - When challenges exists excitement begins
Session-03	16-Apr-14	1:50pm to 3:30pm S C, JP Nagar	Clarity of way forward	<ul style="list-style-type: none"> - How I can break large to micro, keep a daily target rather than larger monthly target - Focus on who can contribute to my success
Session-04	24-Apr-14	11:30am to 1:00pm S C, JP Nagar	Startegy and how to convert the clients who are difficult to manage	<ul style="list-style-type: none"> - I have a clear mind, it was blocked and cloudy, I have focused on getting more appointments
Session-05	26-Apr-14	12:00am to 1:30pm S C, JP Nagar	<i>Establishing Trust, value and eliminating tension, risk</i>	<ul style="list-style-type: none"> - Got clarity and clear understanding on how to approach prospects and clients applying path of least resistance
Session-06	04-May-14	9:00am to 10:30am Phone call to US	Plan meticulously in meeting the prospects and complete backend work	<ul style="list-style-type: none"> - Good to connect. Gained more clarity on the prioritizing
Session-07	11-May-14	7:30am to 8:30am Phone call to US	Prioritise to the meet the prospects, RFP and complete backend work	<ul style="list-style-type: none"> - Exciting, consciously working keeping in mind what should be my outcome - Arjun building it to be a pleasure rather than pressure
Session-08	20-May-14	7:30am to 8:30am Skype US	Are there any loopholes and how do I build if there are any shortfalls	<ul style="list-style-type: none"> - Good and I am able to see that I am in a very good position. I know which one to prioritise
Session-09	28-May-14	7:30am to 8:30am Skype US	Focus on achieving \$300,000 by 25 th June 2014	<ul style="list-style-type: none"> - Guidance and someone who appreciates the efforts is helping - Advised to maintain the same

	Date	Time / Location	Context	Insights from the session
				pace and intensity
Session-10	01.06.2014	7:30am to 9:00am Skype US	Focus to close the RFPs and meeting 2 potential clients in next week	<ul style="list-style-type: none"> - Very exciting. Somewhere there was a doubt that will this be possible. - This association has given me the confidence and built the rationality. - This call helped me to prioritise. - Build more RFPs (upto a \$ 1 million dollar). - Thinking beyond \$3,00,000.
Session-11	08.06.2014	7:30am to 9:00am Skype US	Paving ways for meetings of Dr.Badri with the clients	<ul style="list-style-type: none"> - It is good. Well prepared for Dr.Badri, to discuss what is relevant
Session-12	15.06.2014	9:00am to 10:30am Skype US	Create intention and focus to generate good leads from the conference and also come up with ways to convert RFP and Prospects already generated to orders	<ul style="list-style-type: none"> - This session how I achieve & close it
Session-13	22.06.2014	7:40 am to 8:45 am	Closing the deals and taking the prospect calls and RFP's to a logical conclusion	<ul style="list-style-type: none"> - Focusing on the goal and achieving the goal - I am energized totally

Summary of goals and session wise relationship with the goals:

	Date	Goal-1	Goal-2	Goal-3
Primary Goals	02-Apr-14	A. Meet atleast 15 clients from US for CD by June 30th 2014 - Who have 3 or more molecules for funding trials - Intention to outsource B. Meet minimum 15 clients who do not have in-house capability for PD by June 30th 2014	Generate 10 RFPs (5 CDs and 5 PDs) with a total worth of \$5 million by June 30th 2014	Signing a contract worth minimum \$3,00,000 by 30th June 2014
Wow statement		<i>Success molecules</i>	<i>Perfect 10</i>	<i>Signing to Glory</i>
Important/ Challenge	02-Apr-14	High Importance and Highly challenging	High Importance and Highly challenging	High Importance and Highly challenging
Session-01	03-Apr-14			
Session-02	10-Apr-14	Excited	Energizing	Very happy
Session-03	16-Apr-14	Achievable make it possible, made some effort to fix meeting with clients in U.S	Achievable	Achievable
Session-04	24-Apr-14	Committed	Energizing	Exciting
Session-05	26-Apr-14	Confident of doing this	Achievable	Confident
Session-06	04-May-14	Confident to meet 30 clients	Confident	Very bright chances, I am confident
Session-07	11-May-14	Very confident	Confident and there is lot to achieve still	Confident
Session-08	20-May-14	Very confident of meeting more than 15 each	Very Confident	Confident
Session-09	28-May-14	Very confident of achieving this and chances of over achieving	I will achieve this	Confident of achieving this
Session-10	01-June-14	Confident of completing	Very confident of achieving	I am confident I will achieve
Session-11	08-June-14	Very confident of achieving it	Very confident of achieving it	I am confident I will achieve
Session-12	15-June-14	Already achieved completed 30 meetings	Very confident I will achieve it	I will achieve it
Session-13	22-June-14	Achieved this	Almost achieved this	Very confident of achieving this

Annexure - C

John's Order status as on 14th of August 2014					
Confirmation received in written or verbal					
Company name	CD	PD	BABE		
Cipla 1 study	1,50,000	0	0	Written	Contract will be signed by 22nd of August 2014
Cipla 2 study	30000	0	0	Verbal confirmation	Contract will be signed by 26nd of August 2014
Saptalis	7,00,000	300000	0	Verbal confirmation	Contract will be signed by 22nd of August 2014
Pharos	0		24660	Written confirmation	Contract will be signed by 26th of August 2014 (not taken into account)
Total in USD	8,80,000	3,00,000			
Contribution					
Ricon			4,00,000	Written	Contract will be signed by end of August (Telecon is there on 17th to finalise the contract)
Company name	CD	PD	BABE		
Bio-Gen extracts	F N A				
Dr. Reddys- Invitro	F N A				
Dr. Reddys-Clinical	F N A				
Pharos	F N A	F N A	F N A		
Cipla- pivotal clinical	F N A				
Cipla- invitro	F N A				
Cis pharma		F N A	F N A		
Abon	F N A				
Contribution (in pipeline)					
Core			F N A		
Pharos			F N A		
Cis pharma			F N A		
Abon			F N A		

F N A - Figures not available

