Driving Marketing Excellence Through a Global Learning Curriculum

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May 19, 2015
Orlando, Florida
Presenters

Pfizer

Robert Baker
Senior Director, Enterprise Training Strategy

Kim Robbins
Director, Marketing Excellence Team

Pfizer

PDG

Jamie Rondeau
Principal Consultant
Session Purpose

• In this highly interactive case study session, participants will travel the journey Pfizer’s Marketing Excellence Team took in leading a global performance improvement project.

• Through this experience you should be able to take away at least one idea for how to drive similar change in a large multicultural organization.

Our focus will be on the issues that colleagues often struggle with and our insights on how to address those issues.
Our Purpose:
Innovate to bring therapies to patients that significantly improve their lives…

…We Will Deliver on Our Mission:
To be the premier, innovative biopharmaceutical company

Guided by the Four Imperatives…

1. Fix the innovative core and generate medicines that profoundly impact health
2. Make the right capital allocation decisions to maximize value and enhance shareholder return
3. Earn greater respect from society
4. Create an ownership culture

Our Values
- customer focus
- community
- respect for people
- performance
- leadership
- collaboration
- integrity
- quality
- innovation
Our Numbers at a Glance

- **$49.6 BILLION**
  In revenue in 2014

- **55 MANUFACTURING SITES**
  Worldwide

- **175 MARKETS**
  In which Pfizer sells products

- **MORE THAN 10 PRODUCTS**
  With sales greater than $1 billion in 2014

- **MORE THAN 200 NEW R&D COLLABORATIONS**
  In 2014

- **MORE THAN 78,300 COLLEAGUES**
  Around the world
Go where the energy is

Separate singer from song

Get everybody on the bus before leaving

Global to local

Drive learning transfer

The path forward
Go where the energy is

1. The path forward
2. Separate singer from song
3. Get everybody on the bus before leaving
4. Global to local
5. Drive learning transfer
6. SIX FACTORS FOR SUCCESS
Pfizer Business Imperative

**NEED**

Rollout **New Marketing Model** in **85+ countries**

**LEARNING CHALLENGE**

Impact of **1x-designed courseware** varied by country

1 approach x 5 different content providers

**LEARNING GOAL**

Reach **# of learners** with customization while impacting performance
The Pfizer Business Imperative

- Clearly identified gaps in capabilities
- Globally dispersed across 80+ countries
- Need to “ramp up” quickly
- Limited in-country marketing capabilities
- Significant variability between countries
- Limited product launch experience

*The Audience*

- Senior sponsorship
- Hand-picked project leader
- Lacked content-knowledge

*Organizational Support*

- 3 people
- Compressed timeframe (March – December)
- Content and audience SMEs

*Capability development initiative to impact business performance*

9
Capabilities Development Curriculum Map

**Foundational Capabilities**
- Financial Acumen
- Project Management
- Working Effectively in a Matrix Organization
- Personal Effectiveness

**Targeted Curriculum**
- Payer Marketing
- New Asset Launch
- Distribution Channel Marketing
- Loss of Exclusivity Planning

**Core Curriculum**
- Marketing Planning and Essentials

**Legend**
- PDG-led development
- New MET Asset
- Existing MET Asset
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SIX FACTORS FOR SUCCESS
Experts in design, development, deployment and implementation of global training solutions

Content Neutral – Focus on strategy, design and pull-through across courses

Ensure consistent learning approach across courses

Work with marketing agencies/SMEs for core content
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SIX FACTORS FOR SUCCESS
Roles, Actions and Expectations

- Learner
- Line Manager
- Senior Leadership
- Faculty Facilitator
Communicate Expectations for Each Role

1. Pre-course Communication and Preparation
2. Program Participation
3. Post-course Application and Pull-through
4. Post-course Measurement and Evaluation

Learner, Line Manager, Faculty Facilitator, Senior Leadership
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SIX FACTORS FOR SUCCESS
The Need for Global Archetypes

A framework Based on a well-vetted global model*

Integrates PDG knowledge of learning styles

A face validity model that has been “Pfizerized” (e.g. vetted and adapted)

*Cultural Types: The Lewis Model ©2013 Richard D. Lewis
Translating the Lewis Model

Lewis Cross-Cultural Communication Model

- Dimensions of Learning Design
- PDG Experience in Designing Learning
- Global Learning Experience
- Vetting in Local Geographies

The Black Box

“Pfizerized” Global Learning Archetypes
## Archetype-Specific Notes

### Global Archetype 1: Linear-Active, Notes

<table>
<thead>
<tr>
<th>DIMENSIONS</th>
<th>NOTES</th>
</tr>
</thead>
</table>
| **CONTENT APPROACH** | • Fact-based content with clear examples  
• Process steps and process maps preferred  
• For Simulation:  
  o High tolerance for abstraction; environment need not be identical to real life |
| **FACILITATION** | • Low patience with didactic styles  
• Comfortable with idea sharing, team activities, and collaborative work  
• More experienced audiences comfortable with constructivist/self-defined path  
• Provide opportunities to participate and share experience & perspectives  
• For Virtual Sessions  
  o Limit one-way lecture to no more than five minutes at a time  
  o Provide ample opportunities for learners to participate through polls, open-ended questions, and knowledge checks  
  o Learners will expect to take turns and respect the time of others |
| **LANGUAGE**    | • Language is unique to each country and/or geography |
| **EXAMPLES**   | • Application-based examples are typically most valued |
| **PRE-WORK**   | • Pre-work may or may not be completed; content provided as pre-work should be reiterated in the classroom |
| **PARTICIPATION** | • Learners expect to participate in learning activities, and value a high level of interactivity |
| **COLLABORATION** | • Learners are comfortable with both large and small group activities, and have high level of comfort in reporting out the results of small group activities to the larger group  
• Small groups do not necessarily need a group leader identified, but are comfortable if one is selected |
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SIX FACTORS FOR SUCCESS
Cultivating a Learning Organization

Communities of Practice

Learning Pull-through and Coaching + Real-world application = 

- Improved Metrics
- Improved Job Performance
- Certification

Certification

Pfizer

23
# The Results

<table>
<thead>
<tr>
<th>n=221</th>
<th>(1-5)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Avg</strong></td>
<td></td>
</tr>
<tr>
<td>This event has produced an improvement in my marketing capabilities</td>
<td>4.5</td>
</tr>
<tr>
<td>I will apply the knowledge and skills learned in this training to my job</td>
<td>4.7</td>
</tr>
<tr>
<td>The workshop has been of tangible value in helping me be more effective</td>
<td>4.7</td>
</tr>
<tr>
<td>I am inspired by the fresh thinking and feel confident that I can apply them</td>
<td>4.6</td>
</tr>
<tr>
<td>I know what a great plan looks like and the behaviours and actions needed to make it happen</td>
<td>4.6</td>
</tr>
<tr>
<td>I have identified potential areas for improvement in my plan</td>
<td>4.6</td>
</tr>
<tr>
<td><strong>Recommend the program (10 pt scale)</strong></td>
<td>8.9</td>
</tr>
</tbody>
</table>
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The path forward
Lessons Learned:

- In-region alignment can increase engagement with first-line managers, op plan captains, and regional marketing teams.

- Global leaders can extend the reach and impact of these resources.

2014 Progress Made ~ Varied Implementation:

- Moved from BU-Centric to In-Region

- Culture, Resources Prompted Model to Take Different Forms

- Regional BU leaders determine local needs, serve as voice
Increased In-Region Support & Awareness of Marketing Competency Resources Positions Us to Deliver *Standardized* Global Program

<table>
<thead>
<tr>
<th>Region</th>
<th>APAC</th>
<th>China</th>
<th>Europe</th>
<th>LATAM</th>
<th>Japan</th>
<th>NA</th>
</tr>
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</table>

**Regional Marketing 180 Participation by Business Unit w/ In-Region Partnership**

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>APAC</th>
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<th>Europe</th>
<th>LATAM</th>
<th>Japan</th>
<th>NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>GEP In-Region Coordinator</td>
<td>Hong Kong</td>
<td>✔ GEP</td>
<td>✔ GEP</td>
<td>✔ GEP</td>
<td>✔ GEP</td>
<td>✔ GEP</td>
</tr>
<tr>
<td>In-Country Coordinator</td>
<td>✔ GIP</td>
<td>✔ GIP</td>
<td>✔ GIP</td>
<td>✔ GIP</td>
<td>✔ GIP</td>
<td>✔ GIP</td>
</tr>
<tr>
<td>Pan-BU Project Team</td>
<td>✔ ONC</td>
<td>✔ ONC</td>
<td>✔ ONC</td>
<td>✔ ONC</td>
<td>✔ ONC</td>
<td>✔ ONC</td>
</tr>
<tr>
<td>Shared In-Region BU Secondee TBD</td>
<td>✔ VAC</td>
<td>✔ VAC</td>
<td>✔ VAC</td>
<td>✔ VAC</td>
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**60%** Increase in Marketing 180 Competency Assessments through new Regional Model ~ 2013 vs 2014.
For Example, Japan’s 2015 Plan to Develop Marketing Competency

<table>
<thead>
<tr>
<th>Jan/Feb</th>
<th>Mar/April</th>
<th>May/Jun</th>
<th>July/Aug</th>
<th>Sept/Oct</th>
<th>Nov/Dec</th>
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</thead>
<tbody>
<tr>
<td>Insights Workshop</td>
<td>Marketing Planning Series</td>
<td></td>
<td></td>
<td>Innovation Workshop</td>
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</tbody>
</table>

**Insights:**
- E-learning
- Speaker
- Networking

**Mktg Planning:**
- E-learning
- Speaker
- Networking

**Innovation:**
- E-learning
- Speaker
- Networking

**Metrics:**
- E-learning
- Speaker
- Networking

**Integ Comms:**
- E-learning
- Speaker
- Networking

**Branding**
- E-learning
- Speaker
- Networking

**Launch On-Boarding Program**

**Coaching for Marketing Performance ~ Cornerstones Alignment**

**Complete Digital Learning**

**Complete Competency Assessments**

**Continuous Manager / Colleague Competency Feedback**

Goal: stimulate regular (informal) competency feedback discussions between Manager and Marketing Colleague via Leader-led Communications

Prioritized Based on Assessment Data Available for Japan
Following Implementation, MET Will Assess Best Model to Maintain In-Region Development

### Criteria for In-Region Model Evaluation

<table>
<thead>
<tr>
<th>Leader-Led In-Region Engagement</th>
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<tbody>
<tr>
<td>✔ Marketing 180 Participation</td>
<td></td>
<td></td>
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<tr>
<td>✔ Blended Learning Participation</td>
<td></td>
<td></td>
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<tr>
<td>✔ Willingness to Facilitate Learning Session</td>
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<thead>
<tr>
<th>Effectiveness to Date</th>
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<tbody>
<tr>
<td>✔ Cross-BU Collaboration</td>
<td></td>
<td></td>
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<tr>
<td>✔ Regional and MLC leader feedback</td>
<td></td>
<td></td>
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<tr>
<td>✔ Quantitative/Qualitative feedback on learning program quality</td>
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<td></td>
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<tr>
<td>✔ Application of learning from competency development plans</td>
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<table>
<thead>
<tr>
<th>Sustainability &amp; Efficiency</th>
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</thead>
<tbody>
<tr>
<td>✔ Economies of Scale (Cost, Time)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✔ Commitment to Continue Competency Assessments, Training</td>
<td></td>
<td></td>
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<tr>
<td>✔ Ability to engage influential in-region partners</td>
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</tbody>
</table>

### Key Assessment Criteria:

- ✔ Leader-Led In-Region Engagement
- ✔ Effectiveness to Date
- ✔ Sustainability & Efficiency
Back-up Slides
At Pfizer, we apply science and our global resources to bring therapies to people that extend and significantly improve their lives. We strive to set the standard for quality, safety and value in the discovery, development and manufacture of health care products. Our global portfolio includes medicines and vaccines as well as many of the world's best-known consumer health care products. Every day, Pfizer colleagues work across developed and emerging markets to advance wellness, prevention, treatments and cures that challenge the most feared diseases of our time. Consistent with our responsibility as one of the world's premier innovative biopharmaceutical companies, we collaborate with health care providers, governments and local communities to support and expand access to reliable, affordable health care around the world. For more than 150 years, Pfizer has worked to make a difference for all who rely on us.
Performance Development Group (PDG) is a global leader in providing workforce transformation solutions which build value for our clients by aligning workforce performance with corporate strategy. We work with you to create the strategy, develop the solutions and provide a scalable implementation capability to drive bottom line results through improved workforce performance. Headquartered in Malvern, PA., PDG offers a comprehensive suite of products and services that support the entire workforce transformation lifecycle.
**Bob Baker** is Senior Director, Enterprise Training Strategy at Pfizer. In that role he is responsible for improving the overall colleague learning experience. His 20+ years at Pfizer includes sales, marketing research, country and global brand management as well as new product development. In his last role, Bob developed Pfizer’s way of marketing that includes the standards of excellence, frameworks, tools and training that colleagues need to be successful. His team has also created a learning ecosystem with its 4,000 members of Pfizer’s Commercial Community to accelerate their professional development and collaboration abilities. Bob has a BA in Economics from the College of William and Mary, and an MBA in Marketing from Rutgers. Bob is currently the President of ATD NY.
**Kim Robbins** is Director, Change Management & Communications for the Pfizer Marketing Excellence Team. In this role she works with leaders to design change strategies and learning and development resources to develop and retain talent and support Pfizer marketing in meeting the needs of customers. In this role, Kim led a global, cross-functional team in the creation and validation of one global marketing competency model, selection guides and a skills assessment tool. Together these resources serve as a guide for acquiring, developing and retaining Pfizer marketing talent. Recently, she’s developed a new model for assessing regional marketing skills and development needs. Kim is a member of the Communication Leadership Exchange and the Association for Talent Development.
Jamie Rondeau is Principal Consultant at Performance Development Group (PDG). She is a visionary learning strategist with demonstrated ability to impact business performance through the development of human capability. With more than 20 years of experience in learning, sales, marketing, leadership development, customer satisfaction, organizational development, selection and assessment, Jamie draws on her combined expertise to build results-based solutions that are practical and measurably impact performance. Jamie creates value for clients by identifying ways to maximize growth and improve business performance through individual and organizational capability development. A graduate of Arizona State University, Jamie has a Bachelor of Science in organizational communication with an emphasis in marketing.