The SuMo Sales Academy

Learn Why Modern Sales Leaders Coach for Success

Industry Expert: *John O'Neil from Post Office Money*

- Post Office Money was launched in 2015 to provide an umbrella brand for all financial services provided through Post Office Ltd.
- Over 11,500 branches across the UK (more than all the other high street banks added together)
- John O'Neill, Salesforce Implementation Manager, from Post Office Money tells us why modern sales leaders coach for success.

What challenges did you face in the launch of Post Office Money?

To start with our team was spread out across the country which is a challenge when you're tying to introduce a new CRM system, coach a team and develop a relationship with customers, all at once. On top of that, we were tying to move the team away from paper-based processes into a more automated solution – so coaching was absolutely vital to ensure our team was well equipped to service our customers.

We took a democratic, rather than autocratic, approach because we feel coaching should really be a two-way system – you have to sell and not tell your ideas, give people the chance to have input into the process they're being asked to do. You have to make sure people understand why we're asking them to do something. Getting them involved rather than giving them a message from head office.
In our case, we had to support a team that was being moved from a paper-based system onto a modern CRM system, so it was necessary to coach them along the way. We couldn't expect to roll-out the system and wait for people to catch up with it alone.

A lot of people in our branches felt uncomfortable sitting behind this new system, because they felt it almost put a wall up between them and their customer. This is why, we encouraged them to bring the customer into the system, turn the screen around and work with them on this new piece of equipment.

What's vital for a successful implementation is to get coaching right from the start. Get your team working together in the same way from day one.

How did you get the attention & engagement of your sales team?

Rather than try to guess what our team's business pains were, we actually went directly to them and asked them how they thought we could solve the issues they were having.

We started with a smaller team, getting our '*champions*' involved early on so they could trial the new system and process out and then feedback to the rest of the team. I'd suggest you start small and get a picture of what your process looks like and how it's working out for your team.

“One of our biggest challenges was to engage & coach a disparate workforce effectively – whilst remote”

What results did that uncover?

Interestingly, we found that some of our top performers were innovating around the edges of our process. So what we did was look into what they were actually doing to try and work out how we could fine-tune our own way of doing things.

What we aimed to do was not ask our top performers to do more (this tends to not have very positive results). Instead, we focused on the core team, the people stuck in the middle, trying to get to that top tier of performance but struggling to do so. What we did was turn the people at the top into the champions, after all, their way of doing things was getting very good results, and have them support the core performers so they could follow their lead.
Because our team felt like they had the power to innovate around our process, they felt more engaged and motivated to perform better.

What did you do next?

We wanted to drive engagement and improvement across every aspect of our sales process, so we devised an approach that started with simple engagement and slowly ratcheted up the complexity of what we were asking our sales teams to do over time.
We monitored key metrics across our sales process and once certain behaviours looked like they were becoming habit, we would move on to the next level. With continued tracking we could monitor to see if certain behaviours were tailing off again, if they did we would re-introduce them and start rewarding for them again.

We have always been very clear that our measures were not about “selling more stuff” but focussed at all times on behaviours that would ultimately strengthen the relationships our teams were developing with the customers they engage with every day.

We have the tendency at looking at the end of the funnel to find answers and results but actually, if you look deeper into the process, you can start picking out issues waiting to happen, earlier on.

"Top performers were actually innovating around our process. This insight helped us fine tune our entire sales methodology!"

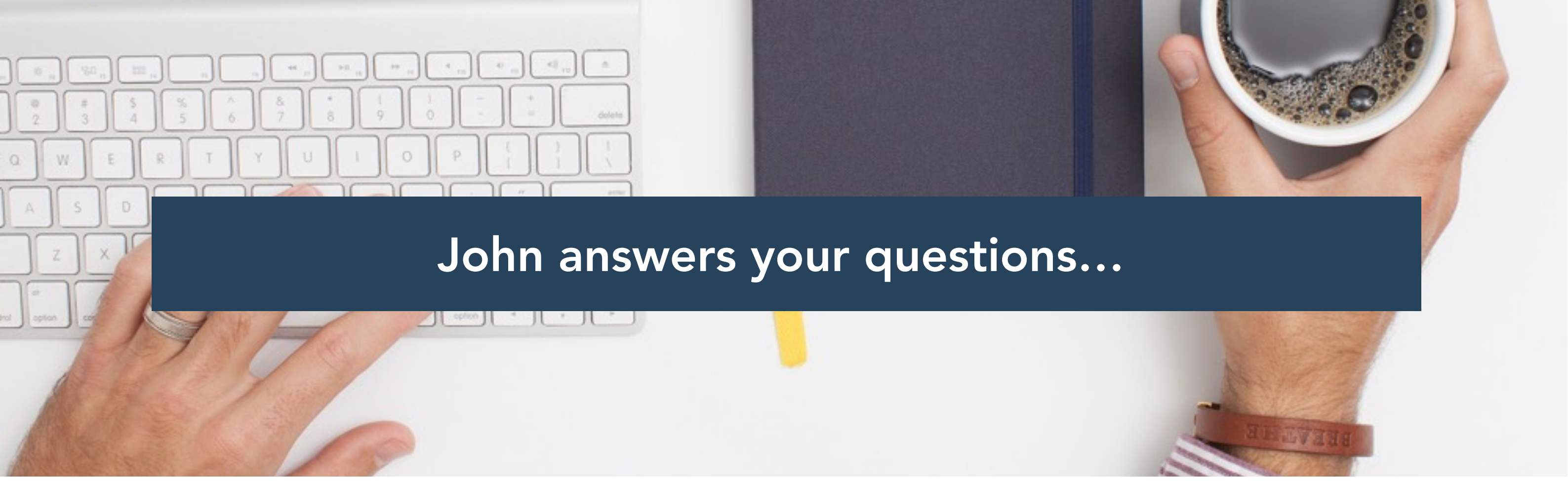
How did you reward your users?

We asked them what they wanted as a reward and I was expecting them to ask for trips to New York or something grand like that. But actually, what they wanted was simply an email from head office saying they had done a great job or for their area managers to take them out to coffee to recognise that earlier that week they had done something really amazing. It was the little things that had the biggest impact.
It was very interesting to learn from their habits and work out patterns of behaviours

Which behaviours did you want to motivate and what results did you see?

We knew that our specialists were having really engaging conversations that helped them to identify ways to help the customer but they weren't always documenting that conversation on the system. We started to give rewards for the length of the discussion captured on the system and saw the quality and quantity improve dramatically.

We also wanted our specialists to follow up on their leads and tasks as quickly as possible. Rewarding this behaviour saw a dramatic improvement in lead conversion as well as reducing meeting "no shows" by engaging with our customers in a timely manner.
We also saw the importance of engagement and collaboration and used gamification to encourage sharing of good-news stories and best practice.
Data quality was also something that was very important to us. Validation rules are one thing but they often serve only to irritate the user! Our approach was to explain the "why" in terms of benefits to the business and more importantly to the customer and recognised our users as they completed key fields on the system.



John answers your questions…

What's the next big thing? Is coaching now over?

Not at all! Coaching is an evolving thing that should never go away. What we're doing now is moving into more innovative techniques on the shop floor. We're moving onto tablet devices, which is much more engaging for both user and customer. Of course, now we have to work on making that successful, making customers comfortable with that use.

What's the age gap like and how do they react to this new approach?

We have a real mix of people, of all ages, genders and background. I'd say, things like Facebook have really helped. People are comfortable with the new technology and are used to sharing information a lot more. So we're using Chatter to share best practice and knowledge through the team.

How did you get the managers to engage with this and how has it affected the way they work?

The guys at the front line immediately saw that things were changing for them in a positive way – we were getting them involved and asking for their input throughout. Managers were more used to focusing on the bottom end of the funnel so trying to get them to look further up that pipeline, to change behaviours, approach and levels of engagement was a little tricky. But it didn't take long for them to see some of the results we were delivering.

What would you change?

I would recommend people attempting behavioural change like this to not bite off more than they can chew. It's easy to become very excited by the prospect and technology involved but I would advise to start small and progress in stages, a little at a time. Also, find some really good people that want to support the project and understand exactly what you are trying to achieve. They will help you reach your goals quicker.

3 THINGS TO TAKE AWAY

1. Are you able to understand exactly why your top performers are your top performers?

2. Do you reward your reps for the journey or just the destination?

3. Modern sales leaders like John manage by leading sales KPIs – Do you?

Listen to the recording here.