



The Path to Sales Power: Focus and Follow-up

By Gail Snyder

Sales meetings, sales quotas, sales conferences, sales training...all such initiatives typically include a lot of talk about selling better and selling more, but then the sizzle slowly turns to fizzle. This repeated phenomenon is often directly related to the fact that many initiatives lack focus, actionable specifics, or any means of follow-up. Of course sales reps are inundated with specifics when it comes to the quantity or type of product they should sell and by when, but most processes are very short on the how. One sales division of a prominent national bank decided to turn that formula on its head, by *starting* with the how.

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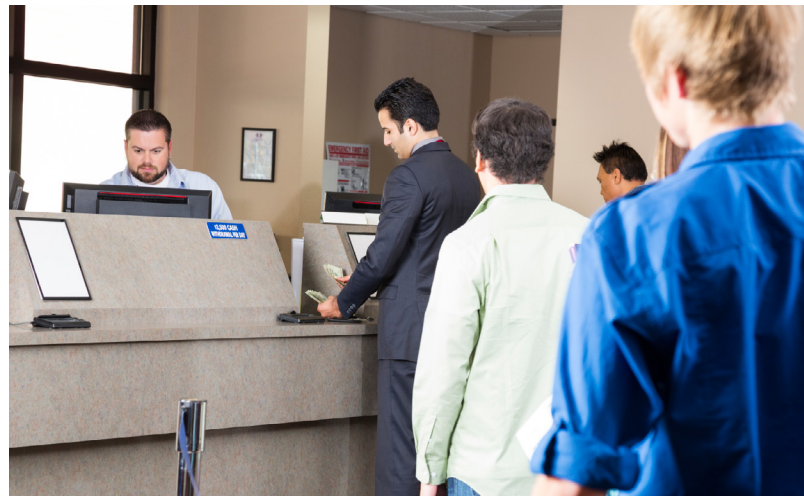
– Rose Vitale

Fifth Third Bank, headquartered in Cincinnati, Ohio, traces its heritage back to 1871 when the Third National Bank purchased the Bank of the Ohio Valley, which was established in 1858. At the turn of the century the Third National Bank joined the Fifth National Bank. The organization adopted the name of Fifth Third Bank and steadily grew to its present day status: a prestigious corporation with 19 affiliates and over 1100 full service locations in nine states. A 2005 *Fortune* 500 company, Fifth Third was listed by *Forbes* as one of the 2000 leading companies in the world; *Business Week* ranked Fifth Third as the “7th most philanthropic” organization; and *Global Finance Magazine* declared Fifth Third as one of the “world’s safest banks.” Therefore, when Fifth Third’s Processing Solutions division welcomed a new general manager, Donald Boeding, he knew he would be working with a winning team, but he also knew that this great team could do even better. He clearly stated two key goals for the sales force—increase the number of deals closed each month and increase the number of products sold in each deal. Then he did something different; he provided a focused plan.

“Our managers have never really been given formalized tools for coaching and managing,” explained Rose Vitale, a consulting and education specialist for Fifth Third. “We had great product training, but nothing that was really sales related.” The first step was to find a process—one that would make a positive and lasting impact. A bank employee told Vitale about a system called Precision Leadership (PL) offered by Aubrey Daniels International (ADI). PL technology had brought about significant changes at a pharmaceutical company where the employee had previously worked. The bank arranged a presentation and they liked what they heard. “We’ve got some great training and management programs, but this

was the first one that I’ve been involved in where there was actual follow-up and support in the form of coaching,” Vitale said.

Processing Solutions is one of four of the bank’s divisions. Its sales reps support commercial merchant services for customers ranging from national chains to the smaller, “Mom and Pop owned” locations on the neighborhood corner. These services include credit and debit card transaction processing, gift card programs, Electronic Benefits Transfer (EBT) processing, and check verification services. Fifth Third also provides back office tools for merchants and supports a variety of telecommunications systems. Over 80 sales representatives and their managers who support the mid-range large regional merchants for Processing Solutions were selected for the Precision Leadership initiative.



THE PL PROCESS

“We wanted to give hands-on tools to our managers. What we liked about Precision Leadership is that it is a process, with steps that you can walk through. It’s based on the science of behavior—applied behavior analysis—so we know there’s data and research behind it,” said Vitale.

Prior to presenting the workshop to the division's 17 sales managers, Fifth Third conducted interviews in which they asked the managers to describe their day-to-day activities as they worked with the sales representatives. The information from the surveys revealed that although the word coaching was bandied about, the definition varied. The overall view seemed to be that *coaching* involved telling people the results they needed to achieve, asking them how they were doing, and pointing out errors. "This definition seemed to be one of jumping in when necessary, but there was no consistency or process, and no tracking," said Vitale. "So if somebody is improving, how do you know other than looking at results?"

Vitale had learned from her training to become an on-site PL coach that results are *lagging indicators* of improved performance. Someone could be incrementally improving in all of the behaviors that lead to the results but may give up before those results materialize; that is, if they don't receive the proper coaching and recognition along the way. Precision Leadership helps managers become coaches as they learn how to identify the results they want and the very few crucial behaviors that

lead to those results. With regular measurement, feedback, recognition, and shaping using a detailed behavior action plan, or in this case a *sales action plan*, performers make steady, real improvements. A key word in the process is *action*—providing the person who is to accomplish the plan with explicit instructions about what to *do*.

THE LEADERSHIP SURVEY

Before any of the sales managers began formal training in PL, all of their sales representatives completed an anonymous Leadership Assessment Survey. The survey consisted of approximately 20 questions that targeted a manager's coaching and leadership skills. Some of the questions asked the reps to answer on a scale of 1-5; other questions were more qualitative such as "What would you like for your manager to do differently?"

The process emphasizes to managers that when they coach, their efforts must vary from performer to performer.

The managers rated themselves in the same areas and were asked to compare their answers to those of their direct reports. Several of the managers were not surprised at the results, but for others the exercise was quite an eye opener. "A big part of what they learn in the workshop is that there is a difference between intent and impact," Vitale explained. This experience prepared the groundwork for the session to follow.

FOCUS AND FOLLOW-UP

Vitale completed a PL coaching certification program so that she could become the in-house coach for the sales managers in their new coaching efforts. She notified the managers that she had already arranged individual follow-up sessions with each one of them af-



ter they completed the workshop. That step alone convinced them that this wasn't just another seminar. "We'd never done that, so they knew before they even got here that something was different about this and they liked that," she said.

Two elements gave this particular group a jump-start, according to Joe Wiley, ADI consultant. "Everyone could align with the results that were designated to work on. The focus was very tight and the productive, follow-up coaching played a significant part in the success," he said. As each manager put together sales actions plans for their direct reports, they knew that they had support from their own management and would receive assistance during meetings with Vitale, who met with them every two to three weeks to discuss their progress. Some managers also developed self-management action plans, and reported that the clarity of the strategy enabled them to complete projects that they had procrastinated on in the past.

Every manager individualized an action plan for a sales representative that they felt could make big improvements with a change or addition of one or a few behaviors. Importantly, they were instructed not to try and identify a problem performer, but to begin with a good performer with potential or as Vitale put it, "a rep who, with a bit of coaching, could make a significant improvement in performance." This strategy also meant that the managers would experience a quick success with the process, an event that might serve to bolster future efforts when using the techniques to tackle tougher challenges.

At first, the managers tended to overcomplicate the plans, but with a little practice

and coaching from Vitale they began to make headway. "They quickly realized that the more they pinpoint something very specific and as long as they follow all of the steps, it works!" she said. For example, one new sales rep had excellent selling skills and product knowledge, but had come from a sales environment in which customer leads were provided. This rep had problems generating his own leads.

His manager decided that the rep needed to build on the *pipeline*, the term for deals that are viable, potential sales prospects. He asked the rep to identify five internal busi-



ness partners within the bank, people such as banking center managers or treasury management contacts who could offer strong leads. He also requested that the rep call those five contacts once a week to ask for referrals. Despite his reluctance, because he felt that doing so would be considered pushy, the rep began tracking the number of times he called an internal partner. "At first they were just focused on the behavior: Did you make the calls this week or not? It didn't take long for the performer to start saying, 'Wow, I called so and so this week and they said they knew I was going to call and I have a lead for you.'

This helped him overcome his reluctance. He began with 15 deals in the pipeline. The last time I called, he had over 75!” Vitale reported.

This straightforward intervention convinced this manager and others that pinpointing a simple behavior can lead to impressive results. The manager also learned that the few minutes he spent with this performer each week was a very important part of the rep’s continued achievement. He concluded that it was 15 minutes a week well spent. In addition, this manager also sent congratulatory e-mails throughout the bank regarding the performer’s improvements and successes. Pinpointed behaviors and results, a measurement system, regular feedback, and timely recognition paid off. “That manager really got it,” said Vitale. “The managers now understand that when they start an action plan they must first focus on behavior. It is extremely important for the manager to heavily reinforce the behavior and to make the link between the behavior and the result, so that the performer then realizes that link.”

THE ELEMENTS OF SUCCESS

Fifth Third Bank Processing Solutions completed the Precision Leadership workshop in February 2005 and activated the process the following month. They began to see positive change almost immediately. A month-to-month comparison to the previous year’s revenues and the number of deals closed showed a steady improvement as well as several record months. Many sales reps quickly met and surpassed a new goal of closing ten deals per month—considered a difficult task at the time. “What we see and what we like is steady, consistent improvement,” stated Vitale.



“PL really showed us that if this is possible, then why limit ourselves?”

Vitale attributes the success of this ongoing endeavor to several factors, perhaps the most important being management vision and support. “Our general manager, Donald Boeding, really stepped up at the beginning of this process and told us his expectations. There was no confusion about the results we were trying to achieve. He provided the strategic business objectives, so the team was very focused,” Vitale said. “This is not a one-size-fits-all approach; it requires managers to customize an action plan for each person.

“The follow-up kept the process going,” she stated. The best of intentions and the drive to apply a new way of doing things wanes without someone to coach you until the change becomes a habit. The managers liked the concepts presented in the workshop; they were ready to begin, and convinced that the effort would be worthwhile. However, Vitale is convinced that without the regular follow-up meetings with the managers and their consistent follow-up meetings with the sales reps, the process couldn’t possibly have been as successful. She summed it up: “The comment I get from a lot of the managers is that Precision Leadership has really helped them focus on what they wanted to do and then to actually make it happen—just one step at a time.”

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[About the Author]

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Gail Snyder is a staff writer for Aubrey Daniels International. For the past 27 years, she has worked with clients to share their stories of the impact the science of behavior has had on their people and their business. In addition, Gail was the editor of Performance Management Magazine from 1987 to 2004.

[About ADI]

Regardless of your industry or expertise, one thing remains constant: People power your business. Since 1978 Aubrey Daniels International (ADI) has been dedicated to accelerating the business and safety performance of companies worldwide by using positive, practical approaches grounded in the science of behavior and engineered to ensure long-term sustainability. ADI provides clients with the tools and methodologies to help move people toward positive, results-driven accomplishments. Our clients accelerate strategy execution while fostering employee engagement and positive accountability at all levels of their organization.

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