

Create an Infrastructure That Reinforces Performance



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Do you remember a time when you conducted some training for your marketing reps or team, had high expectations for revenue increases but were disappointed and frustrated with the results? Do you recall meeting with them to discuss poor results to find some did not have as high a sense of urgency as you? Do you find that despite all the effort, your staff doesn't seem to contribute as much as you would like to achieving your company's strategic goals? You are not alone as this is a common complaint of business owners and sales managers. How do you better insure the results? How do you create a sense of urgency with your staff?

You do it by creating an infrastructure within your company that is a constant reminder to your staff of expected results. Infrastructure refers to all the systems and processes established in your organization that reinforce use of skills learned in training classes. It includes sales and service goals, systems to monitor goal achievement, programs to give recognition for achievement, and accountability for performance. This article will provide some guidance and tips on implementing these infrastructure components in your company.

To make the connection between corporate objectives and staff performance and create a sense of urgency, you must recognize that most of your staff want to feel they are making a contribution to your organization.

They are motivated by achievement. However, their focus may be off. To refocus them, it's important to have goals and expectations for every position, measure results, provide feedback, give recognition when they have done well and hold people accountable when they are missing the mark. While this may be common for sales positions, we need to set goals for everyone to keep them challenged and raise performance. Here are some things we recommend:

1. Set Expectations for All Positions – If you want to have a high performance marketing team, employees must see meeting their goal as a big part of their contribution. Ask each of your staff to come up with their own goals. By asking each staff member to do this first, it will help get the buy-in and commitment needed to succeed. Marketing staff might want to increase the number of closed cases. Your administrative assistant can shoot to reduce the number of errors. Commissions' goal can be to get the "ABC monthly report" to you within 48 hours of month end closing. The next two sections address goals for key activities that lead to results and a "must have" goal for teams and individuals: "producer satisfaction".

2. Measure Producer Satisfaction – Create a brief email or telephone survey and ask your producer's to rate your staff and/or individual staff members on their knowledge, professionalism, responsiveness, overall service, etc. Assign a point value to each question, e.g. five questions on a 1-4 scale with 4 being excellent and 1 being poor. To get a perfect service score you need 20 points. Note that these are subjective categories. An even more effective method is to establish measurable and/or verifiable service standards. List some of the standards in a survey to producers asking them if the standards were met. You can even tie the survey back to individuals and give recognition (see point 4) for good service or coach someone if the ratings were less than expected.

3. Measure Key Activities – Whether you have one or many marketing reps in your agency, they need to be consistently performing key activities to get the results. Sample activity goals for each rep might include: make a minimum of 10 outbound calls a day, have 5 consultative conversations to learn about the producer's business, send out 5 marketing letters per month. We all know sales is a numbers game and activities lead to results. Therefore, be sure to set goals for both activities in addition to results. When working with Ed

Ledford, of Marketshare Financial, we asked his team to turn in at least three forms a day briefly outlining one key "fact, pain or dream" they learned about a producer's business.

4. Provide Recognition for Achievement – Recognition is an acknowledgement verbally or through some deed for a job well done that shows genuine appreciation for a specific behavior. The most basic human need is to feel valued and appreciated. All other things being equal (such as the right job fit, paying market wage, etc), when you recognize employees, results will improve, not to mention morale and productivity. While we know this on a gut level, many manager managers have difficulty giving recognition consistently.

One suggestion is to create an achievement club based on attainment of measurable goals that impact your revenue, productivity and service (or other strategic goals). Give recognition quarterly and yearly to all staff who are 100% of achievement. Recognition with this kind of subjective criteria is called formal recognition. A second suggestion is to make a commitment to look for opportunities to give recognition each day through informal recognition. This type of recognition is more ad hoc with only general criteria as to what is recognized. Look for opportunities to praise team members who truly deserve a pat-on-the-back. (If you are short on time and would like a turn-key recognition program, call and ask about our GuideBooklets™ on developing programs for both of these forms of recognition. Also, look for our article dedicated solely to recognition in the next NAILBA Magazine).

5. Build in Accountability – Most organizations have a business or strategic plan but only one in ten execute successfully. Why? Their employee performance is out of sync with strategic expectations. Many business owners

and managers set goals and measure performance but do not manage performance. More specifically, performance appraisals do not include goals that were set, managers do not coach effectively when results are not being met and, worst of all, if an employee fails to meet expectations, there are no repercussions. Life goes on as usual in a "performance optional" environment. Why go through the trouble of running a business and then put up with mediocre performance? Do yourself and your team a favor— draw a line in the sand as to your expectations and hold people accountable!

Another word on coaching: When we consult with clients on sales and service improvement we tell them that once we have helped them implement all of the above infrastructure, it's the managers who will be the "glue" that holds it all together by being coaches. Think of your team as Olympic athletes that want to win the gold. They are relying on you as their coach to set the goals, encourage them, provide feedback, measure performance and help them succeed. It's important to take your coaching role seriously. Monitoring results is easy. However, developing your team is a challenging yet worthwhile skill that can increase performance significantly.

In summary, visit with each member on your team, ask them to set goals, define your expectations, measure results, provide feedback, hold them accountable and most of all— be a coach! If you missed the previous articles in our series, article number was an overview of the three key components needed to create a marketing mindset with your staff: skills, infrastructure and organizational development. Article number two addressed the skills component and covered four strategies to help your staff sell consultatively and build trust with producers.

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Barb and Bob Romano are the co-founders of **High Definition Banking®**, a national consulting, training and motivational firm that partners with banks and credit unions to increase sales, deepen customer and member relationships, turn them into loyal advocates and maximize client's investment in CRM. For more information visit www.HighDefintionBanking.com and www.HighDefPeople.com.