

Develop a High Performing Marketing Machine

Article 1 of a 4 Part Series

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“We’ve provided sales training, implemented a sales tracking system and an incentive program. However, our marketing staff is only going for the quick sale with producers and not developing the long-term relationship.”

All too often we hear the above comment from BGAs voicing frustration at their efforts to get their staff to be more consultative and develop deeper relationships with producers. What undermines many BGAs efforts is thinking you can simply run marketing staff through training, give them a product manual, add a few other ingredients like tracking and, of course, some “incentives,” and in due time the results will suddenly materialize.

What BGAs need to realize is the process of accelerating their marketing culture and creating a marketing mindset includes many additional components that fall into three critical areas: skills, infrastructure and organizational development. *Skills* include training in product knowledge, sales and sales management. *Infrastructure* refers to the systems and processes that reinforce use of skills learned in training classes. These include: sales goals, service standards, service measurement, sales tracking, performance management, recognition and more. *Organizational Development* refers to tools and practices that help a company gain buy-in and commitment from their staff to do what it takes to reach a higher performance level. Some OD components include communication, implementation

teams, employee climate surveys and more. In summary, a company culture is dynamic and multifaceted. Changing that culture requires a multifaceted approach.

Consider that all these components are only

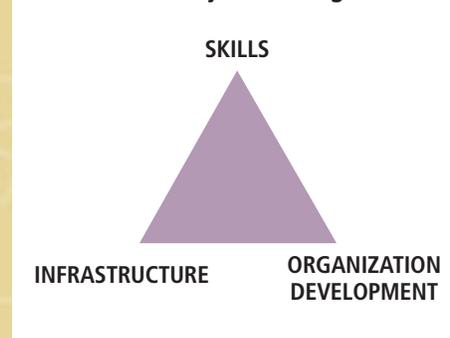
As you may have surmised from reading so far, to impact results you can take a quick-fix approach (with short term results) or one that is a little more holistic (for long term results). In the next four articles we will be outlining steps in creating a marketing culture taking the more comprehensive approach. We will address these areas above and outline key strategies to improve sales and service performance by getting your marketing staff to be more consultative and by creating a sense of urgency among all your staff.

ORGANIZATION DEVELOPMENT

Before you start training staff to be more consultative, your efforts will be best served by building a solid foundation of support from managers and employees. If they do not buy into the new behaviors that will be expected, if just one manager pays “lip service” to this process, that indifference may infect some staff attitudes and results will be diminished. Following are some practical ideas to demonstrate your commitment as a CEO and build buy-in and commitment from your staff:

- **Make enhancing your marketing culture a strategic initiative** – To become a reality, the development of a marketing culture must be part of the CEO’s vision. Make sure your strategic plan identifies “building a marketing culture” as an objective and a high priority to be accomplished in three to five years. Then develop a well thought out tactical plan for achieving this goal over that period of time. Caution: having just one or two statements such as “offer sales and

Figure 1. Developing a marketing culture requires more than just training.



pieces of the process — pieces that, when implemented alone, are not likely to generate long-term results. Creating a marketing culture requires you consider your organization to be more than just a collection of its parts. Any efforts to impact the culture need to take into consideration action steps that impact results beyond training alone. At the base of the whole effort must be strong organizational structure, management practices and leadership. The “total approach” yields the best results: a clear strategic direction, organizational goals, individual accountability and involvement by all departments and employees.

product knowledge training” only highlights some tactical steps. These steps are fine but need to be within the context of a larger plan that includes the other broader areas in the triangle in figure 1. Ask yourself, “If we had a true marketing culture, what would that look like?” Then write a statement that encompasses your vision.

- **Let staff rate your existing marketing culture** – The attitudes of your employees tell you a lot about your business and the level of their morale and satisfaction. Any company that intends to implement any kind of an initiative, big or small, would be well advised to do an employee survey first. Getting employees to change their behavioral in some way requires trust and managers can never be sure how well they are doing in this area. Asking your employees how they feel about specific issues opens dialogue and builds trust between management and staff. Plus, a survey demonstrates you value their opinion and are listening to their needs. Conducting a more targeted survey that focuses on factors that impact your marketing culture will give you a benchmark to start from and helps your company gauge the success of your efforts to improve sales and service from the employees’ point of view. It can also identify potential obstacles before you start any action steps. You can create and conduct your own survey but if employees feel confidentiality will be compromised in any way, staff are not usually as forthcoming in their responses especially with written comments. Romano & Sanfilippo has recently added twenty questions to our survey to gauge how engaged staff are in their jobs and how loyal staff are to our client companies. Engaged staff are committed, involved, participating and available to other employers. Disengaged staff have mentally checked out and are emotionally divorced from your company.
- **Hold an off-site retreat with your management and staff** – If you are either just getting started in this area or simply want to formalize your company’s past efforts, hold an off-site retreat with your employees

We suggest you ask people to write their comments and to agree or disagree on a sliding scale with statements such as:

- I have achieved a high level of proficiency in the skills needed to sell our products and services.
- Mediocre or substandard performance is not tolerated in this organization.
- I am clear on what’s expected of me and how I am evaluated.
- I am free to “bend the rules” in order to provide the best service possible.
- In my company, when people perform well, they are rewarded accordingly.

to discuss your sales and service philosophy and to strategize ways to impact your marketing culture. A retreat helps to unite everyone in a common vision and obtain their commitment. That vision must then be clearly articulated and inspiring enough for employees to want to be a part of it. An off-site retreat is an excellent way to accomplish this.

You want your employees to walk away from the retreat feeling valued having been asked to participate. This is exemplified by two comments from a recent retreat conducted by Romano & Sanfilippo:

The value of an off-site retreat includes:

- Creating a sense of urgency to instill a marketing culture.
- Uniting your team, including all administrative and support areas, in a common vision and obtaining their commitment.
- Increasing understanding of the commitment of time and resources needed.
- Achieving increased enthusiasm for moving forward.
- Improving internal service and teamwork by involving all departments in the planning process.

- *“The retreat was valuable because I am considered part of the team and they count on my contribution to the success of the organization. My opinion is counted and respected.”*
- *“At first I did not think I would get anything out of it and it was required for us to be here, but if management will embrace this training it will be a better place to work. I would know I have a value to make this a better place to work and make a difference.”*

We consider sharing the vision and getting employee buy-in are key initial steps to get off to a good start. In the next three articles we will discuss how to train your marketing staff to be more consultative with producers and pre-call plan effectively; how to conduct sales meetings that educate and motivate; how to monitor and coach for performance; how to reward and recognize performance and how to insure your employees are fully engaged in their jobs. Have a successful and prosperous 2006!



Barbara Sanfilippo delivered a highly-rated session at NAILBA’S Annual Conference and will be the opening keynote speaker at the FOCUS Meeting. She is an award-winning speaker, retreat facilitator, consultant, and author of *Dream Big! What’s The Best That Can Happen* and contributing author of *The Service Path: Your Road Map for Building Strong Customer Loyalty*.

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.

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