

110% uplift in sales and a 25% increase in capacity through removing low value work and greater role clarity for sales staff

By clearly defining roles, centralising low value activities and upskilling leaders and team members on practical personal productivity techniques a regional distribution team were able to create 25% capacity to enable the frontline staff to focus on meeting customer needs

The Problem

A Regional Sales Force with 500 plus staff across 70 locations of a large business bank was experiencing slowing revenue growth and declining market share. The leader of the business identified the need for a full review of the current operating practices of the business to lift the frontline capacity to enable them to spend more time with clients and grow the business.

The Approach

The review leveraged Lean Six Sigma tools and started by understanding the current state. Once the current state baseline was developed the main barriers stopping the sales force from spending time with clients was identified and prioritised. This was then quantified and the key drivers behind those barriers was determined. Solutions were then developed and deployed across the sales force to address the root causes.

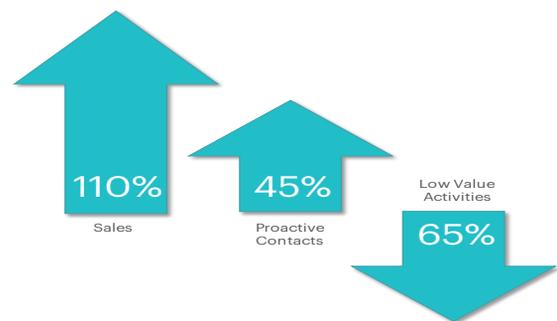
Findings

The baseline analysis identified that frontline staff were spending less than 40% of their time on clients activities and when they did the focus was on low value administrative tasks rather than meeting client needs and generating revenue for the business. Also, staff were reactive rather than

proactive and there was no role clarity with all staff working on the same tasks.

Solutions

An integrated suite of solutions was developed to address the problems which involved migrating out low value tasks to centralised support teams, redefining the roles and training the staff on personal productivity techniques to eliminate the reactive behaviours.



Results

The solutions fundamentally transformed the business with the frontline staff gaining an additional 25% of their time with clients. They achieved this by reducing the low value work by over 70%. This resulted in an increase in proactive contacts of over 45% and additional sales volumes grew at 100%+.

Change Management is the key to Success

This initiative transformed the business and set them up to deliver future revenue growth. To successfully achieve this, a detailed change management strategy was essential as the change was deployed across the business. The strategy also included targeted elements to build leadership capability to deliver sustainable change.

