How a Company Tapped into Their Number One Asset to Hit Sales Target

Summary:
A sales development company hired by an education company to qualify leads Monday through Friday, 9 a.m. to 9 p.m., received an unexpected request five months into the six-month trial. They would now be required to work weekends as well. Rather than leadership taking charge and rearranging schedules from the top, the organization utilized the **Virtual First Tool™,** "The People Know the Answer." Front-line agents became more engaged, worked together to develop a plan to meet the client's demands and achieved success for the client.

Problem:
An education company hired a sales development company to help them hit their annual revenue goal. The job of the sales development company was to qualify warm prospect leads and, if qualified, transfer those prospects to the education company so they could continue the sales process and make the final sale. The sales development company had agreed to a six-month trial period for performance. Their current objective was to help the education company hit their annual sales revenue target.

As part of the contract, the sales development company had agreed to qualify leads for their education client Monday through Friday from 9 a.m. to 9 p.m. At about the five-month point of the six-month trial period, the Vice President of Sales for the education company ordered the sales development organization to work on weekends to increase the qualified lead flow. The VP informed the sales development company that he didn't think he should pay an additional fee for the extended hours of service he was asking them to provide.

The program director knew that simply explaining the situation to the agents and then changing their schedules would cause high absenteeism, lower productivity, and lower performance. The director also knew this could lead to not hitting the goals and ultimately losing the contract.

Solution:
Management Team wanted to drive the initiative with current process but were afraid the account would be lost

During a **Weekly Learning Forum**, the management and leadership teams were led in a discussion about the situation. These leaders were concerned that the client's request was impossible and that the agents would never change their schedules and work weekends. They were also very concerned that the organization would lose the account, ultimately leading to layoffs in their organization.

As part of the **Weekly Learning Forum** a new **Virtual First™ Tool, "**The People Know the Answer" was introduced. The leaders were assured that by utilizing this tool a solution would surface from the front line agents that would change the way business challenges were strategized and new processes driven. Members of the leadership team just shook their heads in disbelief. They believed that the agents would not change their schedules on their own and that the new schedules would have to be a mandate causing a surge in absenteeism and attrition.

The People Know the Answer

Since **Weekly Learning Forums** help leadership experience and practice new leadership skill, the leaders assembled a group of front-line sales agents who were working that afternoon. Leaders asked the Facilitator leading this Learning Forum how they could "make" the agents work on the weekends. The Facilitator explained, "We are not going to make them do anything. The agents are going to come up with the plan to change their shifts and work part of the weekends with no overtime so we can help our client hit their sales revenue goal."

During this **Weekly Learning Forum**, the Facilitator further explained the situation to the leaders and their agents then, in true transparency, added: 1) The client would not be charged an additional fee for the expanded hours of operation, and 2) no overtime could be paid because of budget constraints. The agents were asked to figure out how to qualify leads over the weekend hours while not working more than their 40 hours a week for the next month. One agent wrote down the challenge on the white board. Then the facilitator demonstrated the leadership tool real time and asked the agents to come up with some ideas.

Understanding the Big Picture

After the Facilitator explained the situation, the agents just glanced at each other. The Facilitator said, "This is a real business challenge for us. We need to help our client hit their sales revenue target, and when we do this, it will mean more revenue and growth for our company. *When that happens, there will be more leadership opportunities available in our leadership development program because we will be expanding.* I trust you to figure this business challenge out. *You know this business because you are on the front lines every day.* I know if anyone can figure this challenge out, you can. I have all the faith in the world in you. I know you can do this." The Facilitator added, "Who wants to make a suggestion first?"

With the management and leadership teams asking additional questions, the front-line agents soon had a list of strategies on the board. With the workforce manager there for support, it didn't take long for the front-line agents to come up with a plan, complete with a process for the team to sign up for shifts. They also determined how the agents could change their own schedules and how they would figure out who could work on the weekends.

Rising to the Occasion

The leaders were excited and continued to smile to see this new leadership tool in action. One of the leaders mentioned that the agents' level professionalism during the brainstorming session was to be commended. The next day, this core group of agents drove their process. Agents volunteered to sign up for split shifts, some even saying they could work three separate shifts in a day. Some agents spread out their shifts to work more days in the week.

The agents asked if the company would feed them; the Contact Center Manager agreed and asked the client to provide the pizza, which they were happy to do. Some of the management and leadership team members volunteered to bake goodies to keep energy high. Then one of the agents suggested a potluck each weekend during this push month. Everyone was enthusiastic at being able to come up a solution that would help increase the client's sales revenue and help their own organization grow.

Outcome:
New Virtual First™ Tool Pulls the First Big Win

The leaders were excited and even mesmerized that a new and simple leadership tool could make that big of a difference. Instead of changing agents' schedules or even producing new shifts and asking them to sign up for them, this new leadership tool was the foundation of allowing the front-line agents to come up their own plan. Now they had a stake in the success of the outcome. When a goal is accomplished, employees have a real sense of pride because they not only came up with the plan but executed it. By being honest and forthright with the business challenge, this leadership tool encourages employees to come up with the same, or even better, solutions than leadership would have.

The team rose to the occasion. A creative schedule was produced, and they pulled out all the stops. The leadership and management teams helped on the phones too, when necessary. The client provided pizza, and the front-line agents brought in baked goods for everyone. The agents decided to extend the potlucks to Friday, Saturday, and Sunday as they raced toward the sales deadline!

The Second Big Win: 100% Team Schedule Adherence

Everyone showed up for work, and every shift was signed up for and completed. If something came up, agents would just exchange shifts among themselves. The director showed up on the weekends to support the team. The president of the business development company even came by and personally thanked the agents.

The Third Big Win: Increased Revenue

A month later, the client informed the director they had hit their sales revenue target. Some of the agents cried because they were so happy they had helped their client hit their goal. There was a real sense of pride in the organization, and the entire company was buzzing with excitement. This meant more business, and they continued to raise the bar in sales conversion, getting their client more qualified leads.

Moving forward, the leadership and management teams regularly used this **Virtual First™ Tool** and went to the agents for input and ideas. There was buy-in for initiatives because the agents were part of the brainstorming and drove the initiatives themselves. They increased their revenue moving forward as they acquired new clients, increased their daily operational hours, and expanded their operations to seven days a week.

The Fourth Big Win: Reduced Recruiting and Training Costs

This organization's employee attrition dropped to less than *three percent annualized*, which is unheard of for an outsourced contact center! Lower recruiting and training costs slashed costs to their bottom line, which at the same time reduced time and stress spent recruiting and training teams and leadership within the organization.

Added Bonuses: New Leadership Skills Drive Front-Line Employee Engagement and Professional Maturity

Employees become more positive, more productive in their jobs, and more willing to solve problems themselves when they are given the opportunity to help brainstorm challenges. Employees become more engaged and happier as they work together, with fewer issues among themselves because people feel valued. Leaders then save time by managing less and achieving better results for the entire organization.

Moving Forward: Cultivating Leadership and Building a Leadership Bench

This client's challenge and opportunity were a springboard to build more leaders and creative initiatives on the sales development operations floor. The **Virtual First™ Tool**, "The People Know the Answer" creates new skill sets inside organizations, helping to develop formal leaders and a leadership mindset among the front-line employees. When you incorporate this leadership tool, you can see the natural leadership ability come out in some people and observe other front-line employees following these pseudo-leaders.

Implementing new tools enables leadership mentoring programs to happen in real time, utilizing real business challenges and strategies to teach up-and-coming leaders. Utilized consistently, these new skills can be practiced over and over. Leaders will create new productive habits, the leadership bench will deepen, and teams will become more energized. Confidence will develop at all levels in your company, and people will cultivate real respect for senior leadership.

Authentic Inclusion

People come from different backgrounds and have varying thought processes, so getting everyone's input is important. This authentic inclusion is important to create an environment where anything is possible throughout your organization. Don't disregard the introverts when seeking input. Sometimes those quiet, slow-and-steady employees have great ideas. With the **Virtual First™ Tool**, "The People Know the Answer", you and your team can come up with great ideas that accomplish phenomenal results.

The People Really Do Know the Answer

Leaders in any industry must understand that front-line employees have more real-time experience with our customer base than senior-level leaders. When the creativity and expertise of these valuable employees is harnessed, organizations can quickly figure out where the gaps are and get creative ideas for closing them. There is much less tug of war, saving time and money for the organization. When we utilize new **Virtual First™ Tools** on a daily basis, the tools can become a habit, and gaps can be identified quickly. Employees will happily drive revenue and cost-saving initiatives when everyone can feel successful and can help drive the company's bottom line.

Strong Leadership Skills Required to Drive Change

Change can be difficult to drive, regardless if organizations are in a work-at-home or brick-and-mortar environment. Harnessing new leadership skills and engaging employees leads to more buy-in, and the old tug of war trying to drive change can be practically eliminated. When this happens, employees are happy and engaged.