

MARKETING

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# Rapid transformation of a sales force

*Taking a phased “university approach” to change helped one company transform its sales force—successfully—in 6 months rather than the usual 12 to 24.*

**Josh Leibowitz and Ben Vonwiller**

**Article  
at a  
glance**

The commercial-business unit of a direct-services company struggled with high staff turnover and poor performance: for example, it failed to capture nearly a third of its sales leads—roughly 100,000 calls.

The company’s senior leadership, anxious to raise sales almost immediately, set an aggressive target of six months to implement a program for change. Yet transforming a large, dispersed sales force with more than 2,000 reps would be a challenge; previous efforts had achieved only mixed success.

The company initially focused its efforts on the 20 area sales managers, who were assigned the pivotal role in its “university approach” to change. These managers attended training “academies” to master new tools and then in turn trained the junior sales staff, rolling out the program in phases, starting with high-priority markets in their own areas.

## **Situation**

Changing the way a large, dispersed sales team operates is hard, and implementing a sales program quickly and making it stick is even harder. Yet that was the challenge facing a direct-service company's commercial-business unit, which had 20 area managers, 200 sales managers, and 2,000 sales representatives spread across North America. The unit was struggling with high staff turnover and poor performance: each year, for example, a third of the sales leads coming in through the call center—roughly 100,000 calls—were never followed up on, because of weak management tools and processes.

## **Complication**

Investors were looking for quick results, so the company's senior leaders insisted on a program that would raise sales almost immediately. They therefore decided to implement it in 6 months rather than the 12 to 24 typical for a project of this scale. Additionally, in recent years the company had conducted a number of sales-improvement programs, with mixed success, which suggested that employees might be reluctant to attempt another complex change program.

## **Resolution**

Rather than relying on a central team of change leaders and rolling out the program in sequence, from area to area, the company adopted a phased “university approach,” which enabled it to launch the program in all areas simultaneously. The 20 area managers, who had a pivotal role in the sales hierarchy, attended central “academies” along with sales managers. Here they all learned to use new tools and processes, including standardized performance metrics, diagnostic reports, and a custom-designed tool to track and promote accountability for every sales lead. Once the area managers “graduated” from the academy, they rolled out the program in phases, starting with high-priority markets in their own areas. Sales managers and the reps they supervised applied the new tools.

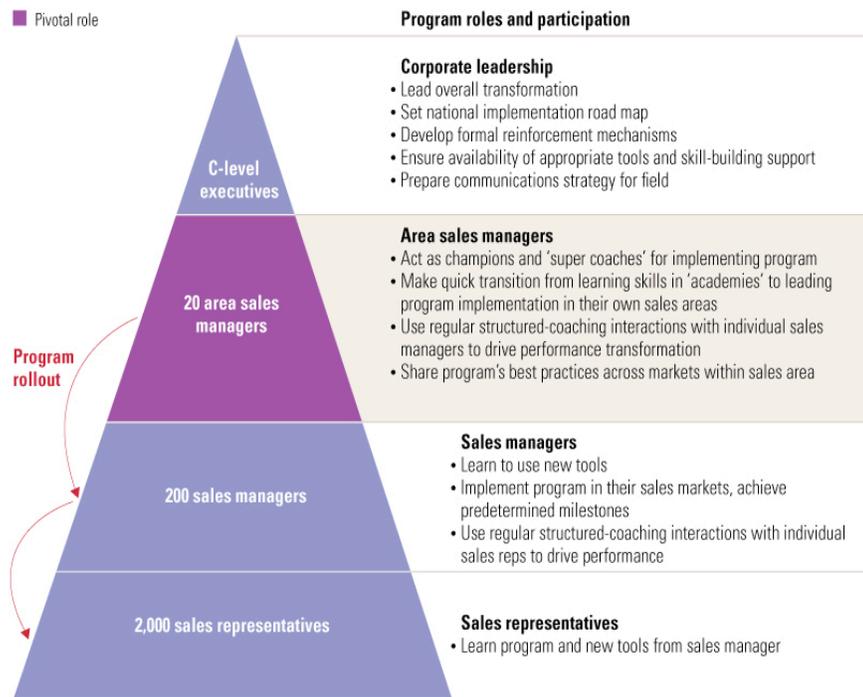
To ensure that these changes endured, the company instituted recurring structured-coaching sessions where area managers used the performance tools to evaluate sales managers and to pinpoint and address their weaknesses. The sales managers in turn coached their reps in the same way. Both the tools and the coaching sessions played a crucial role in the success of the program, which was implemented in most markets within the required six months. By the end of a year, the unit had increased its lead-conversion rates by 20 percent and the number of self-generated leads by 25 percent.

## Implications

Just having the right tools won't force quick or lasting change in the way a large and dispersed sales force operates. But companies can achieve that kind of transformation by identifying an appropriate group of managers, distributed across the organization, to take the lead in promoting change and by adopting the university approach, in which trainees in turn train the employees who report to them. **Q**

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