

### Keys to a Successful Project

It is important to develop learning activities around behaviors. This allows sales contributors at all levels to feel secure in their abilities and to understand the data and explore the possibilities of what it means for them. The bottom line is: behaviors can be changed or modified, whereas personalities are virtually unchangeable.

The primary focus clearly needs to be development. However, as the trust level within the organization rises, it becomes quite natural for it to be used for evaluative purposes as well. The key is to accomplish this by focusing on behavioral skills not personality.

## Case Study II: Sales Leadership

### Background

A large financial services company with 12,000 employees. The company lacks career development and a succession plan to promote internal candidates as sales leaders.

The problem led to high turnover of senior salespeople and a deficiency in growing and maintaining high profile client relationships. The company's reputation in the industry was defined as a 'good training' company — experienced sales professionals eventually leave. The company continuously found themselves with a very green sales force and struggled to sustain consistent growth.

The senior executive team, including the CEO and Vice President of Human Resources, committed to identify high potential salespeople as future leaders and develop current sales leaders.

### Objective

Develop and build sales leadership talent to grow and maintain key client relationships and achieve consistency within the sales organization.

### Process

#### **Phase I: Define organization's leadership needs**

Senior executive, senior sales and human resource leaders met to define key leadership behaviors needed within sales organization to achieve sales goals and linked to organizational objectives. The result was a Leadership Profile with eight key leadership behaviors identified.

#### **Phase II: Assess key leadership behaviors necessary for success**

Sales leaders completed an online leadership 360° behavioral assessment. Sales leadership team participated in a group development session centered on their individual 360° data benchmarked with the leadership profile. Group composite data was shared so the sales team can identify and leverage each other's strengths and create team dynamics.

#### **Phase III: Develop Current Leadership Talent**

Each sales leader received individual coaching with self-selected coaches.

#### **Phase IV: Identify high potential**

The sales leadership and human resource team defined what defines a high-potential within the organization (level of interest, performance, competencies). Each sales leader identified high-potential team members that fit the definition. Each identified high-potential completed a 360° assessment benchmarked with the leadership profile. Group coaching was designed to focus on targeted areas for development.

#### **Phase V: Measuring Development Effectiveness**

Post on-online assessments were completed by each sales leader 12 months after the original assessment. The post assessment was measured against the original assessment data, performance metrics, and business objectives to measure effectiveness and sustain increased individual contributions

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Solutions must be systemic to organizational objectives to provide highest positive net contributions.

Honest and open communication is essential.

## Results

- Productivity of the sales force increased 22% within 18 months
- Turnover decreased by 5% after 18 months
- Open sales leadership positions were the result of internal promotions versus turnover and all positions were successful filled with internal candidates
- Re-assessment during Phase V shows that the composite scores on six of the eight Leadership Profile sets have improved in a statistically significant fashion. All eight behaviors are now within the designated effective ranges
- Created an acceptance and credibility for the model, and the common language of the leadership assessment for a systemic understanding of issues