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## **Case Study**

### **Analysis of diagnostic team ownership process conducted on Saturday XX May 20XX**

#### **Content:**

- ✓ Background
- ✓ Outcome of the one day diagnostic
- ✓ Assessment of current needs
- ✓ Our recommendations
  - Outcomes of each module

#### **Background**

Further to training conducted by client in 2012, our discussion with management on 24 March revealed that staff members were complacent. Management required a process that would make them:

- Be goal & budget orientated
- Understand the numbers & focus on profit / time
- Manage time and activities to achieve the best value (monitor & analyse actions at the customer)
- Think strategically - monetise activity & assess the customer to analyse profitability
- Develop opportunities for new & expand existing business, e.g. replace opposition products
- Function as a team
- Step out of the box (logistics vs sales)

Previous training needed to be implemented / carried through:

- Telephone skills
- Customer care – patience & avoid conflict & arguments
- *What vs How* you say things
- Substitute products out of stock
- Prioritise & do daily planning
- Develop team dynamic – function as a team

We agreed that the first step to achieving the above, was a “diagnostic” one day process that will give them the opportunity to identify and solve some of these issues for themselves and take ownership for improvement. This process took place in May 20XX.

## Outcome of the one day diagnostic

The one day diagnostic was very successful as we achieved a very high level of participation (with the exception of two individuals –discussed with management). The group bought into the process. There was a shift in energy, momentum and attitude. Although there was concern about the intended changes (closing of a branch), most delegates left feeling satisfied that a sensible process of consultation would be followed where possible and that management would act in their best interests too. The fear and uncertainty was addressed and the work done provides the foundation to take the team forward.

The process unfolded organically with people working in the teams of their choice. The following feedback was received from the team on the process:

- *“Useful eye opener. Honest, open forum helps identify positives & negatives – opportunity for growth & improvement.”*
- *“The session today was an eye opener ...learned about my managers and that they do fight for us. 10/ 10 – Enjoyed it very much.”*
- *10/10. “...first time 2 teams come together to talk constructively. Feeling very positive after listening to (our snr manager).”*
- *“...fantastic & valuable day ...sharing ideas....let’s keep it up’.*
- *“I have learned ... new skills ...be used in the work place. I felt like just a number & I discovered that I’m not just a number”. 10/10*
- *“I learned a lot. Not sorry I came. Can go back on Monday & be better ...” 10/10*

The overall rating of the process by the group was 9/10 and it was considered time well spent. They had, after all, sacrificed their Saturday!

## Assessment of current needs

In making the recommendations below, I took the following into consideration:

1. Management’s concerns & requirements
2. Previous processes conducted and outcomes achieved.
  - 2.1 Our previous track record with the team enables us to assess their growth since we started working with them in 2012.
  - 2.2 There is a marked improvement in their customer interaction, negotiation & communication skills.
  - 2.3 The team has matured and become more proactive. Further to setting up the Standard Operating Procedures we facilitated later in 2012, they are now able to make suggestions that improve systems and processes further.
3. The team identified several roadblocks. Their feedback & requests include:
  - 3.1. Follow through with ideas discussed & suggestions made. Ensure that any change that takes place is managed in a positive, proactive way & communicated in time.
  - 3.2. Improve relationship between marketing & sales to build strong working team.
  - 3.3. Team building to keep morale up & improve interaction between internal & external sales.
  - 3.4. Improve time management / personal effectiveness to:
    - Help us achieve our targets by focussing on the right things (improved productivity & use of time).
    - How to plan appointments with customers,
    - Work towards budget, improve profits,
    - Have access to and be able to understand the numbers.
  - 3.5. Training on products & the computer system
  - 3.6. Staff at reception - need training.
  - 3.7. Management need training on how to acknowledge, recognise, praise & delegate – how to get results through people.
  - 3.8. Selling skills – especially for newer staff.

## **Our recommendations:**

The following processes are essential to taking the team to the next level:

1. Personal Effectiveness for Sales People
2. Team Building / Team Enhancement
3. Management to Leadership
4. Performance Management

All processes will be customised to be relevant to the circumstances of the client & needs identified by the team and management.

A short summary of the outcomes follows below. These processes are not just training, but rather:

- Empowerment processes that bring about implementation & lasting change. It is recommended that these processes be rolled out over a period of the next 6 to 8 months.
- Long-term, ongoing contact / exposure is always more effective because it sticks.
- The process includes ongoing follow up and checking on implementation as well as reinforcement of previous learning.
- The process requires occasional contact with time in between when delegates are required to implement specific tools and skills in the work place. Managers are involved in this.
- The suggested processes dovetail with, reinforce & complement previous training conducted.

I suggest we meet to discuss the duration & most effective way to roll out these processes to ensure ROI.