

HELEN'S HEALTH HUT

CASE STUDY

BUSINESS HAS BEEN GOOD AT HELEN'S HEALTH HUT

Helen's Health Hut (HHH)* offers a custom design service for retail stores wanting to sell with a healthy image. Sales are steadily increasing and there is optimism in the health and lifestyle market generally. In fact, business has been so strong that Proprietor Helen has rapidly worked her way up to a team of almost 100, simply to meet the demands of her rapidly-growing enterprise.

This growth has happened organically and Helen has been very pleased with her ability to find people to work in her new and exciting business. This said, Helen herself acknowledges that her onboarding process has been something of a 'scramble' to keep up with ever-increasing workload. This now means she has 31 salespeople who have come to the role internally and with no training or coaching. Helen is starting to gain a sense that her sales force is struggling. Results are beginning to plateau – and with the increasing demands of professional selling her team are enjoying the role less and less. It has now come to a point where HHH is struggling to retain anyone in a sales role for longer than 18 months.

Helen reached out to us and posed the most fascinating question: “How difficult would it be for me to create an environment that would allow my sales team to perform at the 90th percentile globally regardless of size or industry?”

Our simple answer was: “Not difficult at all”.

The obvious next question from Helen was: “If it's so easy why isn't everyone doing it?”

This was where we used her own business as an example. We asked Helen the following question: “We all know that a nutritious, balanced diet and regular exercise are important to a happy and healthy life. So why is it that media reports tell us that obesity and associated health issues are an ever-growing problem?”

Helen explained to us that there are two issues at play. Firstly, one must know what a healthy lifestyle looks like. Secondly, armed with this knowledge, they now must possess the discipline and structure to bring healthy habits into their daily activities.

* Names have been changed for confidentiality

And this is exactly what our extensive research over the past decade shows in relation to sales teams. Time and again they are caught in the inertia of “just getting through” each day. Very little or no time or energy is devoted to stepping back, reflecting and planning to be the best. Even when an organisation attempts proper strategic planning it is often limited to a one or two-day strategy session followed by a week of wrap-up emails, before the business-as-usual treadmill of mediocrity creeps back in to daily activities.

This is her story.

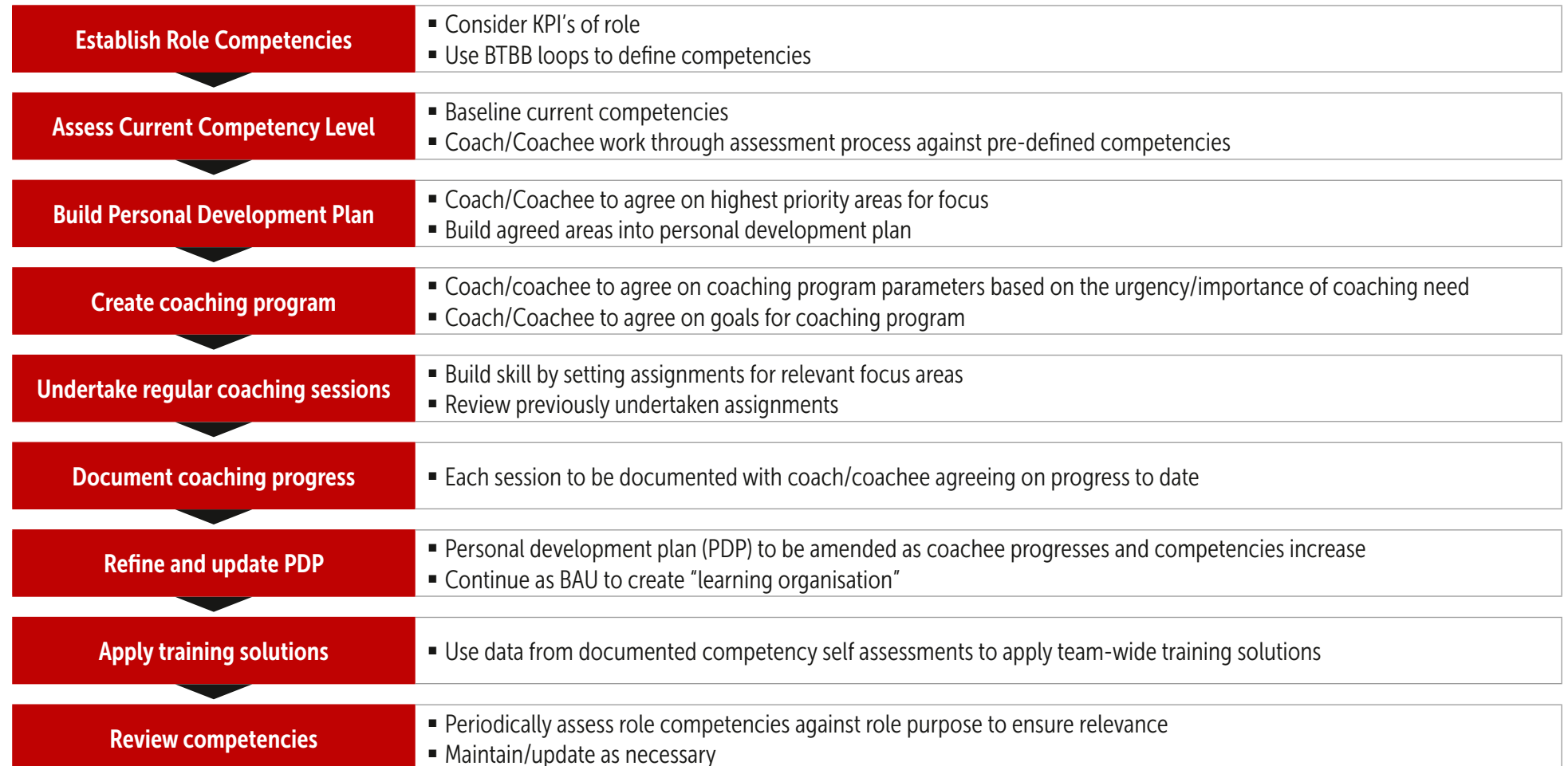
So how to break this cycle? Well, to paraphrase Helen, one must know what a healthy sales force looks like, then one must have the structure, process and discipline to enable and maintain this top-performing state.

After this discussion, Helen emerged determined to have a “healthy” sales team.

Helen’s goal was to ensure her entire sales force was constantly striving to be the best they could be. In short, she wanted to ensure her people did not end up failing, fleeing or being fired.

THE 9 STEP PLAN TO SUCCESS

With our assistance, Helen's Health Hut undertook nine steps to invigorate her people management and development approach. She decided to start with her three Sales Leader roles – each leader having responsibility for the outcomes of approximately ten Sales Agents. An opportunity immediately presented itself as Helen was in the midst of hiring for a Sales Leader vacancy.



Step 1: Establish Role Competencies

Before Helen hires anyone, her first step is to consider the Key Performance Indicators or KPI's that will measure the success of this new role. If this is done well, it will create clarity and motivation for her new hires, plus ensure that the new team is working towards personal and organisational success. It's important that the KPI's for this role are clear and measurable.

When recruiting, it's critical to ensure that the new hire has the ability and aptitude to either demonstrate or learn key competencies that will allow them to successfully achieve the job's stated KPI's. Competencies are the skills that underpin role performance. Helen uses her copy of *Be The Best Boss* to deepen her understanding of the competencies that will best align to her Sales Leader Roles. This handy reference, combined with Helen's analysis of high and low performers, determine that the non-sales related competencies relevant to success in this role are:

- Plan Effectively and Manage Time
- Solve Problems Effectively
- Motivate Others
- Influence Others
- Proactively Mentor.

Now that Helen has determined the correct KPI's and competencies for the role, she can use these measures to inform her recruitment strategy.

Potential risks

- Misalignment of KPI's to role
- Misalignment of competencies to KPI's
- Poor understanding of relevant competencies
- Unsure of which recruitment criteria match role
- Lack of properly structured interviewing questions
- Lack of targeted psychometric testing

Step 2: Baseline current competencies

HHH has undertaken a comprehensive and rigorous recruitment process, including pre-screening, psychometric testing and structured candidate interviewing. The business has chosen their new recruit for the Sales Leader role, Anne.

Anne is a bright, enthusiastic and energetic new employee. She is not overly experienced in leadership, however testing has revealed a great aptitude to learn and an attitude aligned with organisational values. As part of her induction process, her line manager Helen will undergo a “baseline” process to see where her current proficiency lies in relation to the stated job role competencies. Helen uses *Be The Best Boss* to guide her in determining which baseline questions fit intuitively with which job role competencies.

Due to the efficiency of the system she is using, Helen spends just 30 minutes with Anne asking her a series of structured questions which help her self-assess her current level of proficiency. The process is consultative and driven by Anne with guidance from Helen. When the process is complete both parties have a clear understanding of job aspects that Anne feels quite comfortable with, and also other areas of her role where she would benefit from further assistance to maximise her performance.

Potential risks

- Unsure of best baseline questions to ask
- Lack of structure in discussion, resulting in unclear areas of strength and potential improvement
- New hire unable to articulate personal areas for growth
- Line manager not competent in drawing out strengths and improvement areas
- Line manager not confident in one-on-one discussions of this nature.

Step 3: Coach/Coachee Agree On Highest Priority Areas Of Focus

Now that Helen has successfully baselined Anne's proficiency in relation to key job competencies, she knows it's time to have her enter into a coach/coachee relationship which will be ongoing for her whole time in this role. Given that HHH is a small company, Helen takes on the role of coach to help coachee Anne achieve her full potential in this role.

Although Anne has great potential, she is new to both the organisation and this role. There are many areas she would like to work on to become a successful employee of HHH. Helen and Anne engage in a one-on-one discussion to determine which competencies she'd like to focus on as a priority to maximise her on-the-job performance. Here Helen uses *Be The Best Boss* to gain handy suggestions on coaching approaches, linked to the specific competency being improved.

Once this is done, Helen and Anne jointly agree on a Personal Development Plan (PDP). This is a simple plan that gives Anne a pathway towards achieving maximum results in all of her KPI's through systematic coaching on each identified competency. The PDP is structured, is signed off by coach and coachee and contains measurable goals. The PDP is a flexible, living document which is regularly updated and amended as skills grow and new learning and improvement priorities emerge.

The PDP sets the initial framework for regular coaching sessions which are built into the easy-to-track system that Helen is using.

Potential risks

- Coach may lack skill, experience and confidence
- Coach unsure of how to work through competency prioritisation discussion
- Coach and coachee unsure of how to build simple PDP
- PDP does not contain simple learning goals related to desired competencies
- PDP not measurable
- PDP in complex format and difficult to work into BAU process for all employees.

Step 4: Coach/Coachee Agree on Coaching Program Parameters

Now that Helen and Anne have put their PDP in place, it's time to agree on parameters for the ongoing coaching that Anne will receive. Here Helen refers to *Be The Best Boss* to set the framework for appropriate coaching goals.

Helen and Anne spend some time in an initial session working through the following points:

- Goals for the coaching program
- Frequency of coaching interventions
- Who will drive which actions in the coaching relationship
- Governance of coaching progress.

Anne emerges from this initial discussion motivated and confident in the purpose of the coaching program, her role and her coach's role, the outcomes she is working towards and a clear view on the next steps.

Potential Risks

- Coach unsure of appropriate goals to put in place
- Lack of understanding of how to move coaching process along
- Poor management of frequency of coaching interventions
- Ad-hoc tasks taking priority over scheduled BAU coaching interventions
- Disengagement from coachee if coach becomes distracted or coaching interventions drop off in frequency or relevance.

Step 5: Build Skill

Helen and Anne have started their coaching program. The program is regular, structured and both parties are demonstrating commitment towards each other, and ultimately achieving great outcomes for Anne in her role.

This has been achieved by Helen allowing Anne to drive each coaching interaction by bringing specific and relevant scenarios to the session. Coach and coachee then work through each scenario with an exploratory mindset to assist Anne in her journey of improvement. Helen has been using *Be The Best Boss* to ensure Anne's coaching scenarios remain relevant to the overall development of her chosen skill.

At the end of each session Helen and Anne agree on a series of assignments which Anne undertakes to build her skills and close her identified competency gaps. The assignments are relevant, achievable and Helen and Anne are both comfortable that they will assist Anne in increasing her confidence and competence in relation to her job role.

At the start of each new coaching session, Helen and Anne review her progress on previous assignments. Sometimes Anne completes her assignments with ease, allowing her to move on to a coaching extension which will further enhance her competency. On other occasions, Anne may struggle to complete an assignment. If this happens her coach Helen works

with her to understand and remove any roadblocks which may have caused her to have difficulty.

Each coaching session is conducted consultatively with all outcomes mutually agreed, and the coachee's learning progress as the only priority.

Potential Risks

- Lack of understanding of how to bring structure of coaching sessions
- Coach unsure of appropriate assignments to set
- Coach sets assignments which do not appropriately place work effort on coachee
- Coach not confident in review of previous assignments
- Coach and coachee unsure how to deal with non-completion of assignments
- Coach unsure how to provide appropriate extensions to move coachee towards competency achievement.

Step 6: Documentation

During each coaching session, Helen and Anne work together to ensure all results and new coaching assignments are documented in a central database. This helps Helen and Anne keep track of her progress, but also has the collateral benefit of providing clarity for all when considering Anne's on-the-job performance.

The system Helen and Anne use to document her progress is simple, user-friendly and available on-line. They work on this together while the coaching session is happening, which allows both coach and coachee to completely engage with progress made and new assignments. It gives both Helen and Anne a sense of satisfaction they are making tangible inroads into Anne's coaching goals.

As Helen has three Sales Leaders, this system will also allow her to measure her leadership team's progress to the agreed role competencies and identify trends across the business.

Potential Risks

- Difficulty of documenting during session without wanting to break engagement during conversation
- Illegible scribbled hand-written notes
- Coaching notes not filed simply and not consistent in approach over period of time
- No central repository of coaching notes
- Lack of continuity for coachee if new coach appointed
- Difficulty of relating documentation consistently across different coaches in same job role
- Documentation put off until later and becoming memory dependent.

Step 7: Refine and Update PDP

Helen and Anne have been working together as coach and coachee for three months now. Anne is thrilled with her own progress, which she has been able to view via the coaching system that she and Helen have been working with. Helen is also very pleased with her new employee's quick progress.

Together, they have been able to complete several coaching goals and Anne has already achieved proficiency in three of her coaching competencies.

As Anne has continued to learn and grow, she and Helen have worked together to refine and update her Personal Development Plan (PDP). What Anne has realised is that learning is an ongoing part of her life at the HHH company, which she has found exciting as her results against her KPI's have been steadily improving from week to week. As each coaching goal has been completed, Helen has referred to *Be The Best Boss* to help determine the most appropriate next competency to add to the PDP, plus design new coaching interventions. This has made the overall process simple and stress free for Helen, and also very rewarding for Anne.

Anne is looking forward to achieving proficiency in all of her job role competencies, and she's particularly excited because Helen

has promised her that even when this is achieved, her coaching will continue as she can then work towards even higher levels of success in her current role, or potentially career progression within HHH.

Potential Risks

- Overall PDP purpose lost amid daily BAU tasks
- PDP not simple or flexible enough to amend as coachee works through competency achievement
- Coach unsure how to shift focus to various job role competencies
- Coach unsure how to extend coachee once all competencies proficient
- Coach not confident in having career progression discussion with coachee.

Step 8: Use PDP Data to Discover Team-Wide Training Opportunity

Helen has been using the above approach not only with Anne, but with her other two Sales Leaders for 12 months now, outstanding results. Anne is still highly motivated and successful, and she has enthusiastically adopted the coaching methodology practiced by Helen with her own team.

Due to the consistent application of a simple on-line PDP and coaching system, combined with a clear and confident coaching approach by Anne, her whole team is engaged with regular and helpful coaching sessions. This has allowed Anne to build a quality database of coaching progress for her entire team. A quick glance at the reporting shows Anne that a common area of challenge for her Sales Agents is a competency called “Negotiate Effectively”. Anne’s peers from the coaching and PDP reports also show a similar gap with their Sales Agents – a glaring company-wide issue has been uncovered through a consistent and caring application of a rigorous coaching methodology.

Helen is easily able to use *Be The Best Boss* to understand which elements are causing this specific competency gap. This allows her to quickly determine which skills are currently lacking in the team.

Anne and her peers discuss this with CEO Helen, as they feel this skills gap needs to be addressed urgently, and is beyond their skill-set to deal with effectively across the company.

Helen agrees and gives approval to bring in expert external assistance, as the potential benefits are clear. The whole sales team is thrilled to be working for a company that invests in their development – and Anne is thrilled to be able to add value to her team, knowing this is a training session that is directly relevant to their learning needs.

Potential Risks

- PDP’s not consistent across team
- Time consuming and challenging to glean meaningful information and reporting from multiple unstructured PDP’s
- Training not undertaken because of challenge to discover clear need or direction – employees feel they are not being invested in
- Money invested in training without proper analysis of need
- Participants feel they are wasting their time.

Step 9: Reassess and Update Role Competencies

HHH has now grown in size and profitability, and provides a home for over 700 employees. New CEO Anne is reflecting on her 15 year tenure, and how proud she felt when Helen retired and the board unanimously voted her in as new Chief Executive. She still views Helen as her mentor, and she still receives coaching from her, albeit informally these days.

Although in her time HHH has grown from a 100-person business to an industry and nationally admired company employing 700 people, Anne has never forgotten the “learning organisation” that she started with.

HHH’s internal sales structure has grown in scale and subtlety reflecting the many new markets and opportunities they have been able to leverage over the past few years. HHH now employs Key Account Managers, Business Development Managers, Relationship Managers and Telephone Sales Agents. Each sales team has specific competencies, PDP’s and coaching plans tailor-made to their specific job roles and individual learning needs. Although as CEO Anne now has responsibility for Sales, Manufacturing, Finance, Marketing, Human Resources and Operations, she has never forgotten the value of that initial clarity of role provided from her first days as one of 31 sales people on the team.

Being a progressive and intelligent leader, she also understands that as businesses must move with the times to stay competitive, so must job roles and their associated competencies be constantly reviewed.

To this end, Anne has ensured that her Head of HR has, as their first marketplace. the on-going task of continually improving the development structure and competencies to ensure they’re relevant in a rapidly changing internal and external environment. Using *Be The Best Boss*, Anne’s Head of HR is able to ensure a consistent and sustainable approach to applying the correct competencies to the correct job roles; maintaining currency and flexibility, but within a structured and proven framework.

Anne is confident for the future of Helen’s Health Hut, and so are the company’s investors.

Potential Risks

- Overly comfortable with status quo
- Unsure how to review and modify competencies
- Unsure which competencies are relevant in current marketplace

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Accela has over 30 accredited trainers and facilitators across Australia and New Zealand, and over 40 accredited local multi-lingual trainers across Singapore, Hong Kong, Shanghai, Tokyo, Bangkok London, Frankfurt, Milan and Paris.



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