



BIG Consulting

Work With Day Optimiser Tool

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The Value of the Work With Day Optimiser Tool

The Work With Day Optimiser tool helps answer four very important questions from different levels in your business:



Senior Executive:
What's the overall capability of my sales team?



National Sales Manager:
Are coaching days being delivered by my Sales Managers?



Sales Manager:
What are the strengths and weaknesses of each sales person?



Sales Person:
How am I performing versus expectation?

With one easy to use tool, accessed over the web from any connected device, data can be logged and reports generated to answer these four questions, in real time.

Step 1: Customising the Competencies

Name: _____ Territory: _____ Date: _____

POTENTIAL TRAINING NEEDS	On Track	Off Track	POTENTIAL TRAINING NEEDS	On Track	Off Track
KNOWLEDGE			PERFORM		
1. Category Knowledge			11. Plan Your Sale		
2. Mrs Crocket's Policies & Procedures			12. Explore Opportunities through Questioning		
3. Customer Rapport			13. Respond with FAB Solutions		
4. Customer Knowledge			14. Feedback to Check Fit		
5. Strive for Five			15. Overcome Objections		
			16. Resolve and Closing		
PORSMA			17. Make it Happen		
6. Preparation					
7. Open with Impact			TERRITORY MANAGEMENT		
8. Review Outlet			18. Planning to Achieve KPIs		
9. Merchandising			19. Territory Planning		
10. Action					

Territory Opportunities:

1

2

3

Personal Training Needs:

1

2

3

Action Plan:

1

2

3

The first task we undertake is to identify *what does success look like* for each sales role?

- The knowledge, skills and behaviours that we wish to measure and provide coaching feedback on.
- Measurement scales can vary from simple On Track/Off Track, 3 scale, 5 scale, 6 scale or 7 scale measures – the choice is yours.

Step 2: Set Up Users

Modifying Users

*Username	Fred Jones
*Password	password
Permissions	Direct Report
Email	janet.maitland@bigconsult.com.au
Manager	Nichole Hackett

Add Roles to User

Role: Sales Associate (dropdown menu open showing: Customer Service Specialist, Field Sales Manager, King Gee Sales Rep, National Sales Manager, Sales Associate, State Sales Manager)

User's Role: Sales Associate, State Sales Manager

Add Groups to User

Group: Coles

User's Group List: Bunnings, NEW

Step 2 is to set up the **user framework** to allow for appropriate access & data mining.

- User name and passwords allocated
- Permissions set as to who can access what in the tool
- Classify their job role and hence the functionality they are allowed access to
- Apply appropriate customer, channel or geographical groupings

Allows for accurate data grouping and more insightful reports.

Step 3: Coaching Day Record Established

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Users | WWD Sessions | Reports | Guide | Logout

Welcome

Test WWD

Category Knowledge	1 2 3	Coaching Guide
	<input type="radio"/> <input type="radio"/> <input type="radio"/>	
Policies and Procedures	1 2 3	Coaching Topics
	<input type="radio"/> <input type="radio"/> <input type="radio"/>	
Customer Expert	1 2 3	Your Best Buddy
	<input type="radio"/> <input type="radio"/> <input type="radio"/>	
Planning Budget Achievement	1 2 3	
	<input type="radio"/> <input type="radio"/> <input type="radio"/>	
Organisation & Coverage	1 2 3	
	<input type="radio"/> <input type="radio"/> <input type="radio"/>	
Target Customer Development	1 2 3	
	<input type="radio"/> <input type="radio"/> <input type="radio"/>	
Promotional Planning and Control	1 2 3	
	<input type="radio"/> <input type="radio"/> <input type="radio"/>	
PERFORM Sales Process	1 2 3	
	<input type="radio"/> <input type="radio"/> <input type="radio"/>	

Submit WWD

Step 3 is to set up the **competency framework** as an online form, including the measurement scale.

- The tool has extra functionality with each competency being explained via a mouse over movement with the cursor
- Option exists to also add a coaching guide as prompts to help both the manager and the sales person to close the gap
- Now every time a new coaching day is undertaken the scores from that day are recorded online

Every coaching day is recorded!

Step 4: Coaching Day Outputs

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Welcc

Adding Action Plan

Test WWD responses for Sue Jones

Category Knowledge	3
Policies and Procedures	2
Customer Expert	2
Planning Budget Achievement	2
Organisation & Coverage	2
Target Customer Development	2
Promotional Planning and Control	1
PERFORM Sales Process	2

Save Action Plan

Action	Comment	Completion Date
1		
2		
3		

More actions...

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Step 4 is to record the **Actions** required to close the competency gap.

- Actions committed to by the sales person e.g. review some training notes, do some e-learning
- Actions committed to by the manager e.g. prepare some case studies, undertake a simulation in the office, provide some data
- Each action has a completion date to ensure committed actions are delivered
- A copy is emailed to the sales person automatically at the end of each coaching day

Actions are committed to.

Step 5: Manager Reports Analysis

The screenshot displays the BIG Consulting Business Improvement Group web application. At the top left is the logo. A navigation bar contains links for 'Users', 'WWD Sessions', 'Reports', 'Guide', and 'Logout'. A 'Welcome' message is visible on the right. The main content area features a dropdown menu labeled 'Please Select...' and a 'Start a New WWD' button. Below this is a table with the heading 'Click on a session to review a WWD'. The table lists sessions for two managers: Fred Jones and Sue Jones, with columns for the manager's name, the date, and the time.

Manager	Date	Time
Fred Jones	10/11/2009	9:41 AM
Fred Jones	11/11/2009	12:43 PM
Fred Jones	13/11/2009	12:57 PM
Fred Jones	16/11/2009	9:02 AM
Fred Jones	18/11/2009	9:16 AM
Fred Jones	19/11/2009	8:51 AM
Sue Jones	10/11/2009	9:40 AM
Sue Jones	10/11/2009	10:14 AM
Sue Jones	11/11/2009	12:42 PM
Sue Jones	11/11/2009	1:48 PM
Sue Jones	12/11/2009	12:57 PM
Sue Jones	16/11/2009	9:01 AM
Sue Jones	16/11/2009	1:53 PM
Sue Jones	16/11/2009	2:09 PM
Sue Jones	18/11/2009	9:16 AM
Sue Jones	9/12/2009	11:35 AM
Sue Jones	9/12/2009	11:35 AM
Sue Jones	12/03/2010	9:46 AM

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Step 5 allows **previous Work With Days to be analysed.**

- Reports available by individual
- Reports available by date
- Reports available by customer group serviced e.g. chain stores sales team
- Reports available by manager

Reports aid analysis.

Step 6: Suite of Reports Exportable to Excel



Users | WWD Sessions | Reports | Guide | Logout

Welcome

Reports

Report Preferences

- Scorecard and Action Plan
- Ranking/Average Score By Competency
- Action Plan Summary
- Assessment Summary By Date
- Assessment Summary By User

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Step 6 allows **additional analysis** by exporting the formatted data out to Excel.

- Reports available by individual
- Reports available by date
- Reports available by Customer Group serviced e.g. Chain Stores sales team
- Reports available by Manager

Export to Excel if required.

Why use the Work With Day Optimiser?

How can you afford not to have such a valuable source of leverage and data insight to ensure the commitment to on going development of sales people is actually happening every working day?

The Work With Day Optimiser delivers on all fronts:

Features	Benefits
One low annual license per head	Affordable cost of ownership, high ROI
Fully self contained web platform	Safe, secure, easy to access, no IT integration
Valuable data insights at four levels of your business	Ensures on going development is happening, management visibility of human capital, individuals know where they are developing
Underpins your training and development regime	Delivering the missing link in development programs: Traction Control and Leverage
Everyone knows how they are progressing against expectation	Engaged managers, growing sales people, better sales team