

# BEVINGTONGROUP

## The Use of XeP3 at SalesForce1\*

Targeting the right customers  
at the right visit frequency

Understand • Engage • Evolve

[www.bevingtongroup.com](http://www.bevingtongroup.com)



# The Client Background

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- ❑ Salesforce1\* is a significant Australian financial institution operating in a competitive investment and insurance markets
  
- ❑ Salesforce1\* hoped to
  - Make the sales process **more efficient**
  - **Increase** the **time** available for sales effort.
  - Enhance returns through **better customer targeting**

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# The XeP3 Approach

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# Client staff were trained in the XeP3 methodology... this meant that they could manage ongoing reengineering in-house

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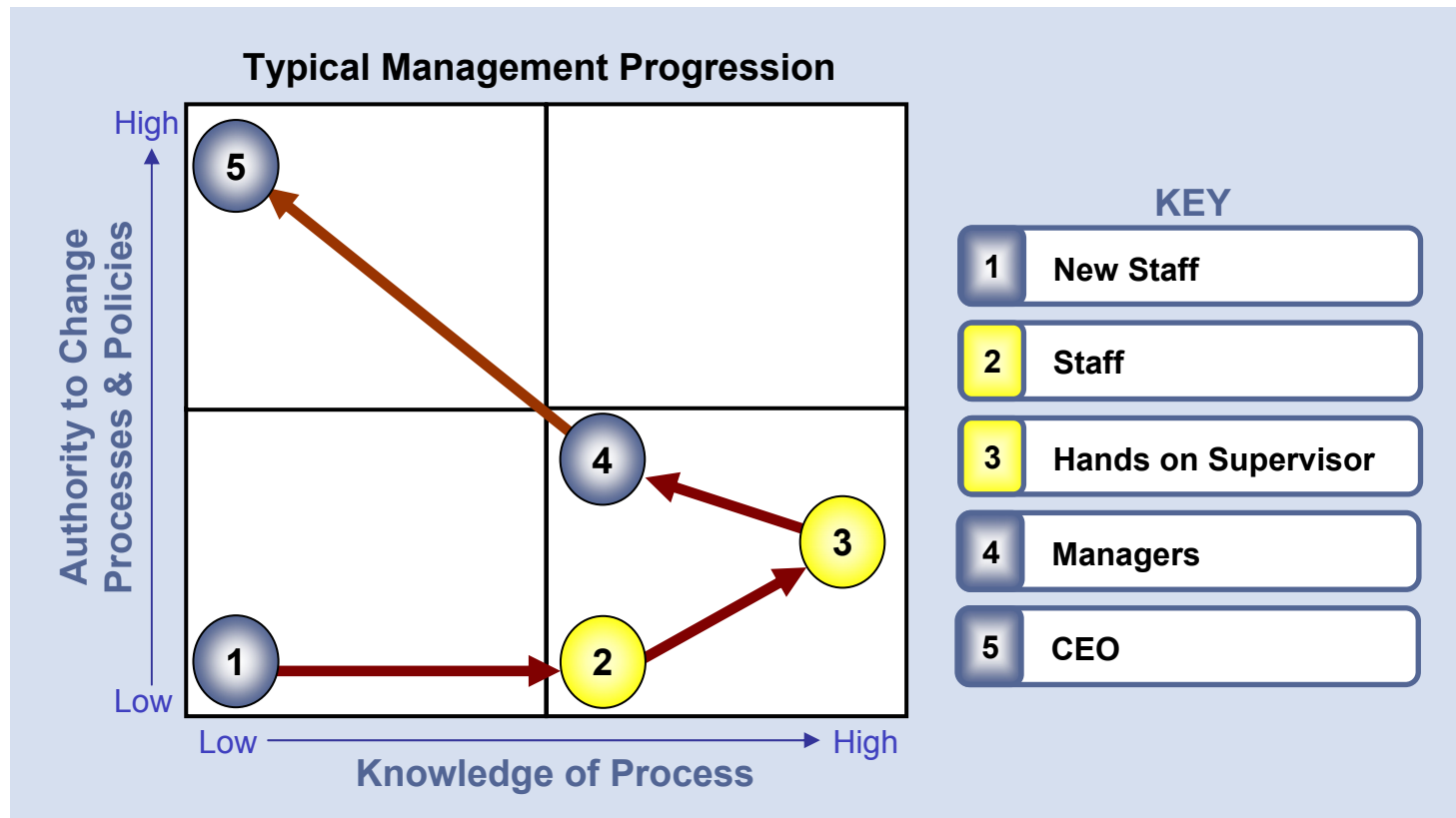
Conducted in 3 project phases: Understand, Engage and Evolve




# With a typical internal management progression you find with increased authority to change comes less knowledge of the detailed process

*Typically organisations find that with increased authority to change comes less knowledge of the detailed process ...*

*The people who do the job are best placed to tell us about it...*



We captured the current reality from the staff who worked in the process... allowing the “real” processes and the “real” problems to be captured from those who experienced the process failures

 <span style="margin-left: 20px;"><i>Sales Force Effectiveness</i></span> <span style="float: right; border: 1px solid black; padding: 5px; font-weight: bold; font-size: 1.2em;">MF2</span>	
<b>Status:</b> <span style="float: right;"><b>AU1 - General Sales</b></span>	
Completed by: _____ Team Member Check: <input type="checkbox"/> <span style="float: right;">Date: Thursday, 2 December 2004</span>	
Quantified Tasks	Quantified Services
Visit intermediaries - 70/month	
Respond to intermediary queries - 40/month	
Present to potential intermediaries - 3/month	
Process new intermediary applications - 2-3/month	
Respond to internal queries - 10-15/month	
Prepare monthly report - 2/month	
Attend luncheons/functions - 1-2/month	
<b>Main and Sub-Activities</b>	
<b>1 Visit Intermediaries</b> 1.1 Identify intermediaries to be visited 1.2 Determine what type of visit (eg lunch/general) 1.3 Contact to make appointment 1.4 Follow up if uncontactable 1.5 Note in diary/act 1.6 Review if other nearby require visit 1.7 Prepare material for visit 1.8 Collate stationary 1.9 Request/follow up IT reports (timely) 1.10 Chase up reports if necessary 1.11 Prepare reference guides	<b>2 Respond to Queries</b> 2.1 Receive query (fax/phone/email) relating to problems 2.2 Receive query (fax/phone/email) not relating to problems 2.3 Answer problem if known 2.4 Contact to clarify 2.5 Seek general information re problem from relevant area 2.6 Seek specific info re problem from relevant area 2.7 Follow up if not available immediately 2.8 Obtain response to problem 2.9 Ensure request processed

# We then classified the value of activities and quickly saw the teams grasp the importance of Bevington's CSDN (Core, Support, Discretionary, Noise) categories

Code	Definition	Example	
<b>Noise</b> <small>25%+</small>	Non-value adding activities which cost the organisation money, reduce service levels and waste staff time. Usually symptomatic of process failure	<ul style="list-style-type: none"> <li>Chase up head office for approval</li> <li>Follow up on any missing documentation</li> </ul>	} Non Value Adding
<b>Discretionary</b> <small>10%</small>	Activities that manage risk to the organisation and/or introduce management approval/checking steps. Usually their frequency or level is adjustable and is at management's discretion	<ul style="list-style-type: none"> <li>Make informal inquiries/checks regarding intermediaries</li> <li>Update company car log</li> <li>Complete daily report for daily reconciliations</li> </ul>	
<b>Support</b> <small>60%</small>	These activities enable efficient delivery of a current service – they represent the normal, actual work being done right	<ul style="list-style-type: none"> <li>Preparation of materials for a sales negotiation</li> <li>Complete capacity analysis</li> </ul>	} Automation Opportunity
<b>Core / Value Driving</b> <small>5%</small>	These few activities directly increase service, reduce cost or enhance capability. They positively change the status quo to <i>drive</i> performance improvement in the organisation	<ul style="list-style-type: none"> <li>Cross sell or up-sell business to a customer</li> <li>Plan which sales calls to make</li> </ul>	} DNA of Business and BCIs

**Categorising the activity was an important step in understanding the issues**

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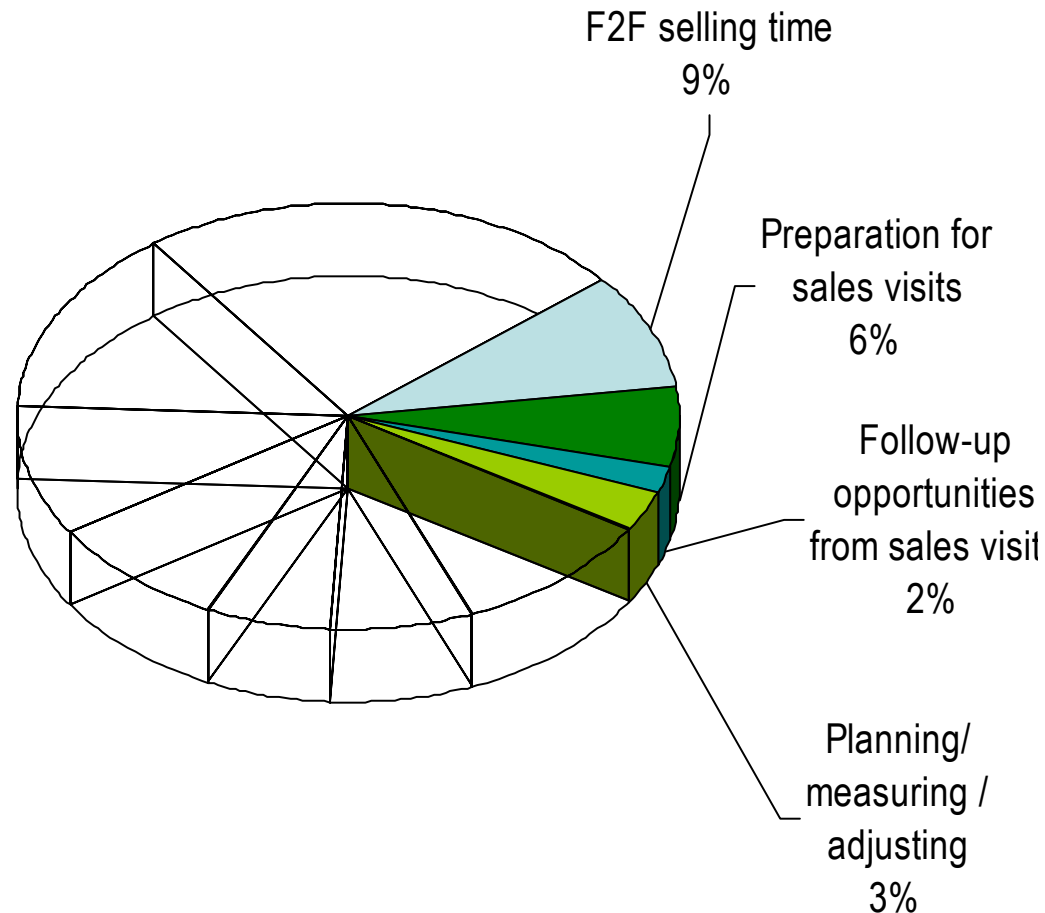
# The Findings

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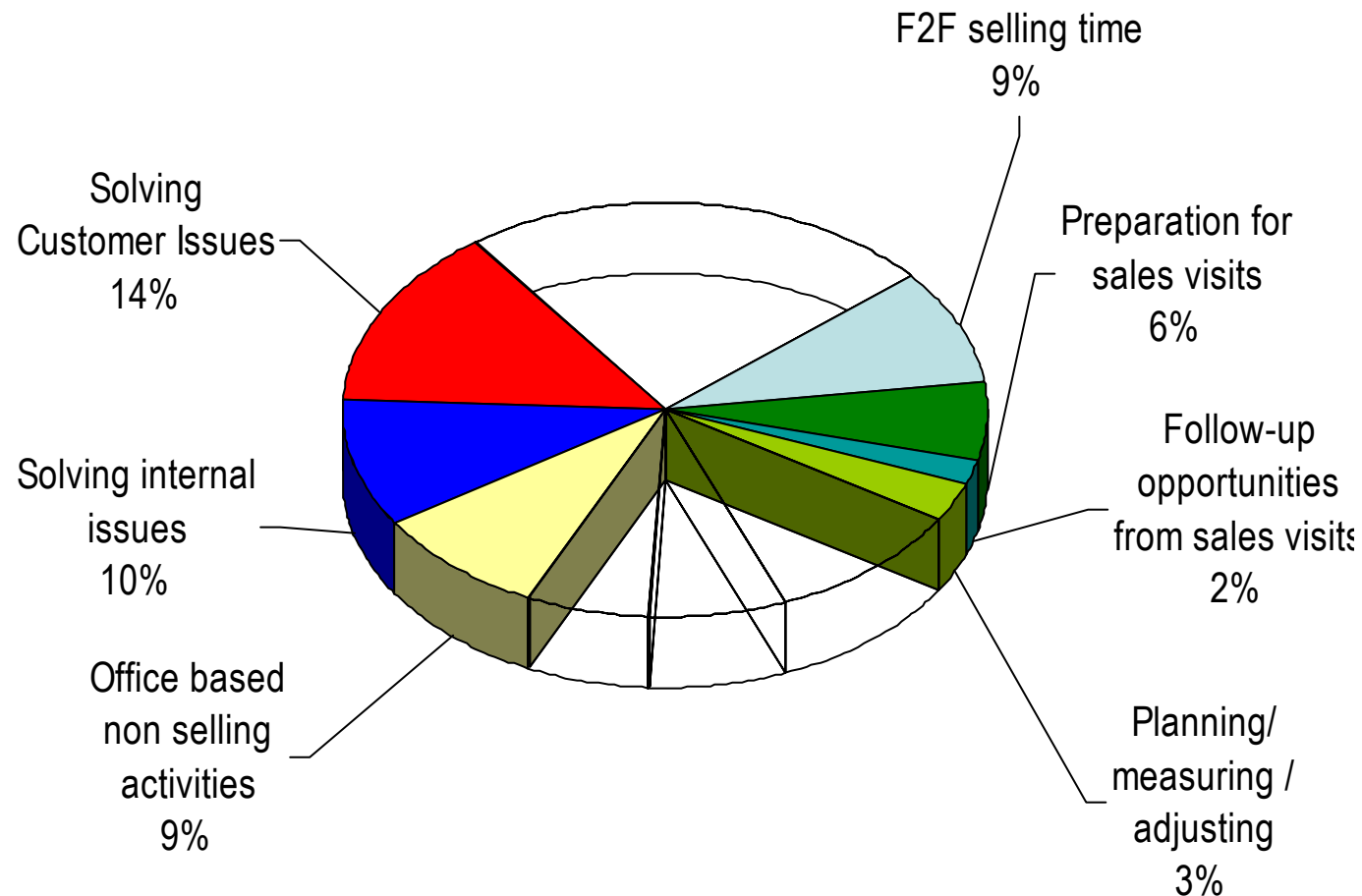
# We saw the sales representatives distracted from selling & planning activities...

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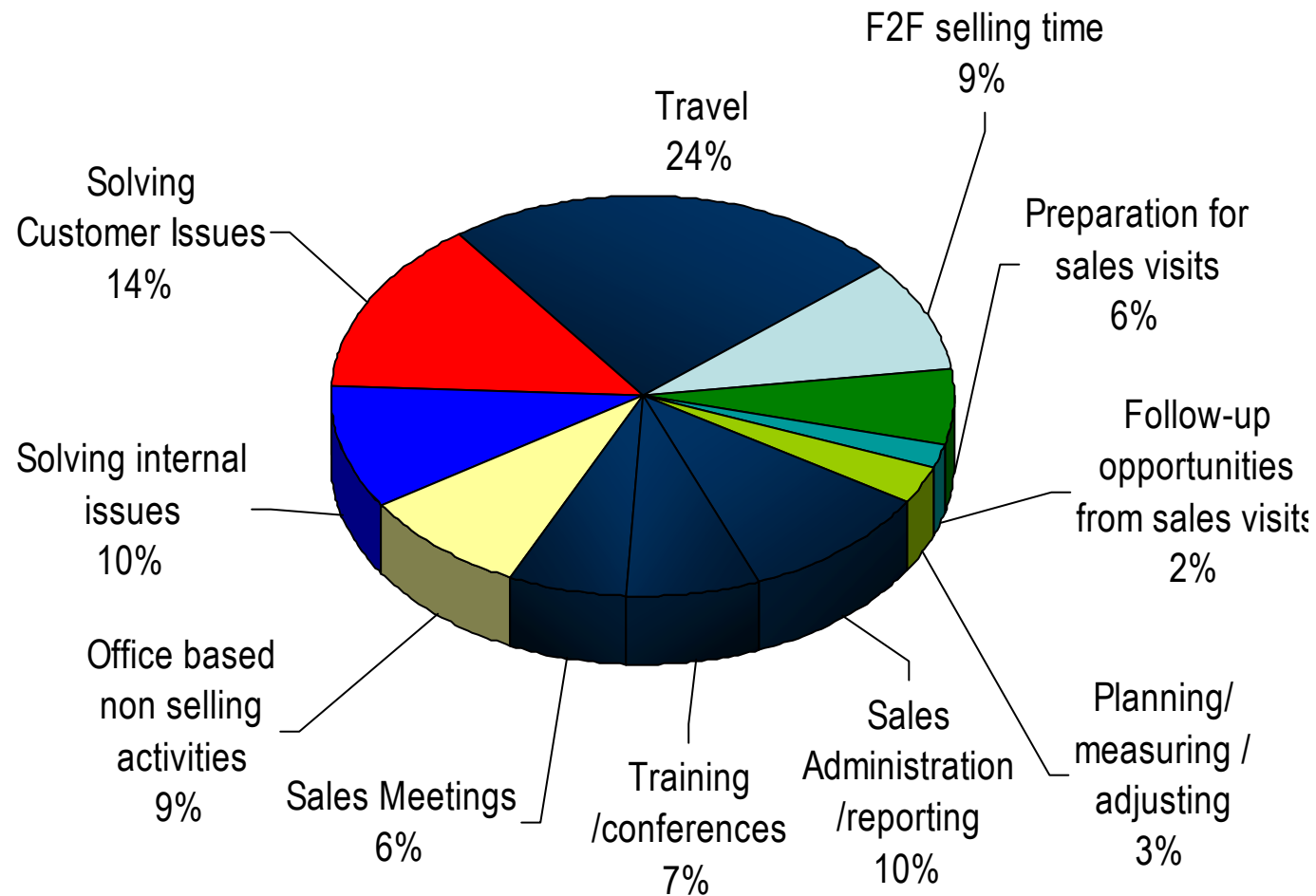
# ...dealing with customer issues and internal administration

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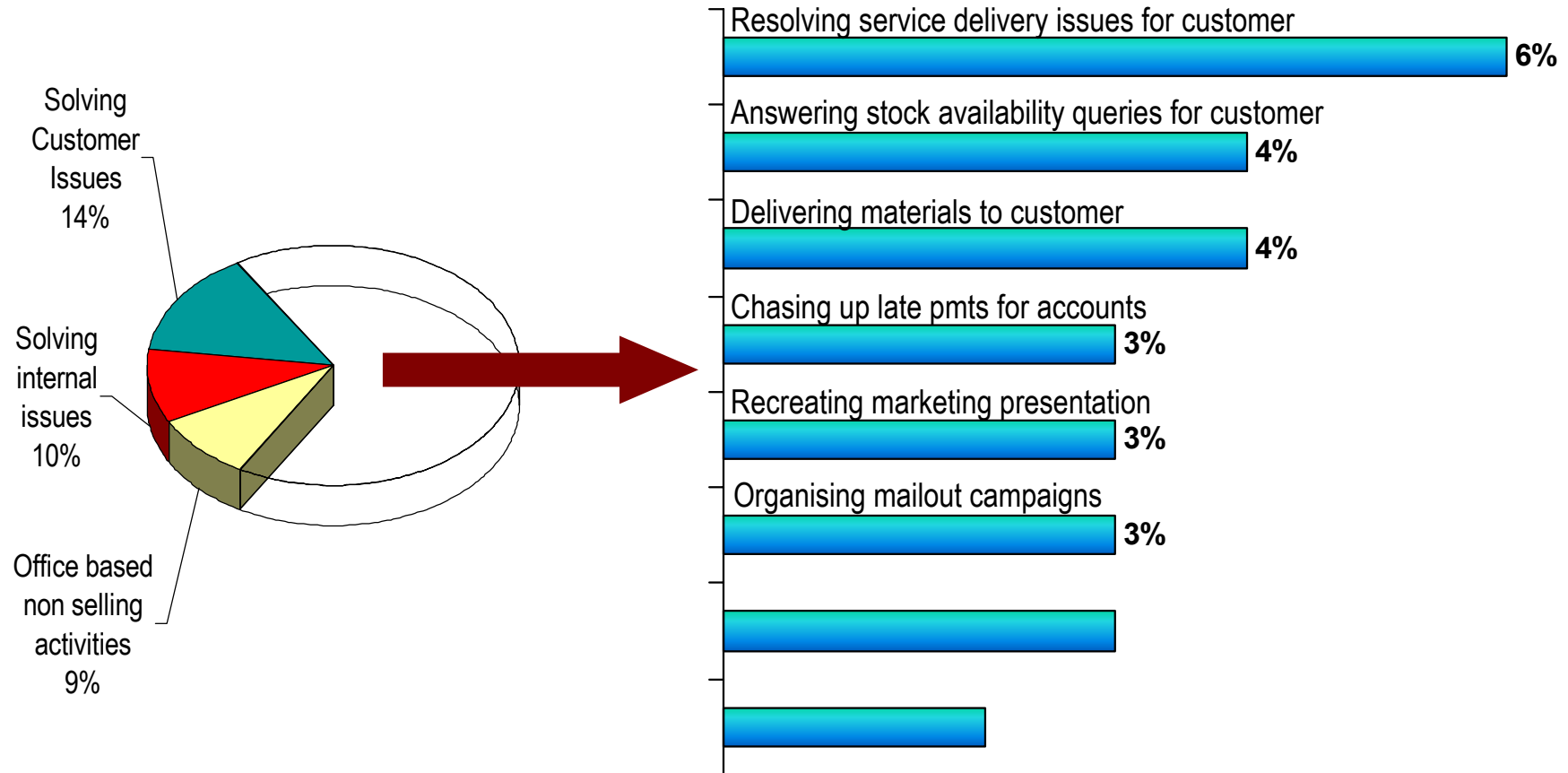


# ...not to mention travel, training and administration

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# We delved deeper to see the causes of the “distraction from sales”



# Finding more than one day per week spent addressing Noise issues and less than 10% of time focussed on critical Core selling activities

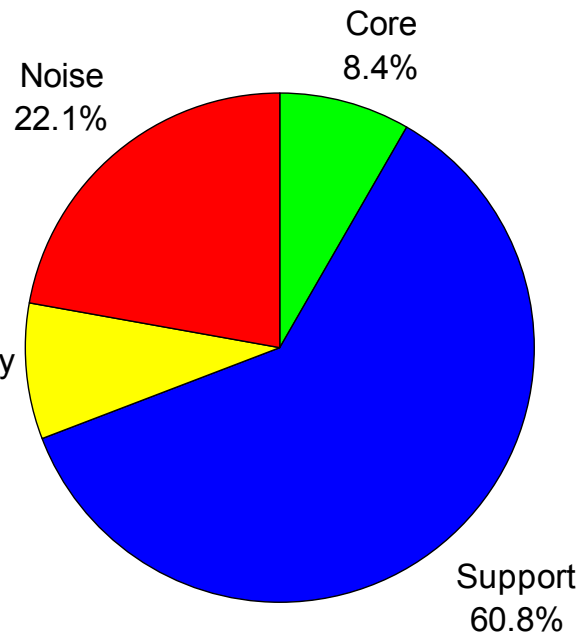
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## Noise Examples

- If necessary refer to appropriate internal contact
- Follow up with internal contact when resolution deadline expires
- Identify short coming (service quality)
- Contact adviser with outcome re problem
- Follow up with admin if not received agency number

## Discretionary Examples

- Network (at professional development days)
- Liaising with interstate offices



## Core Examples

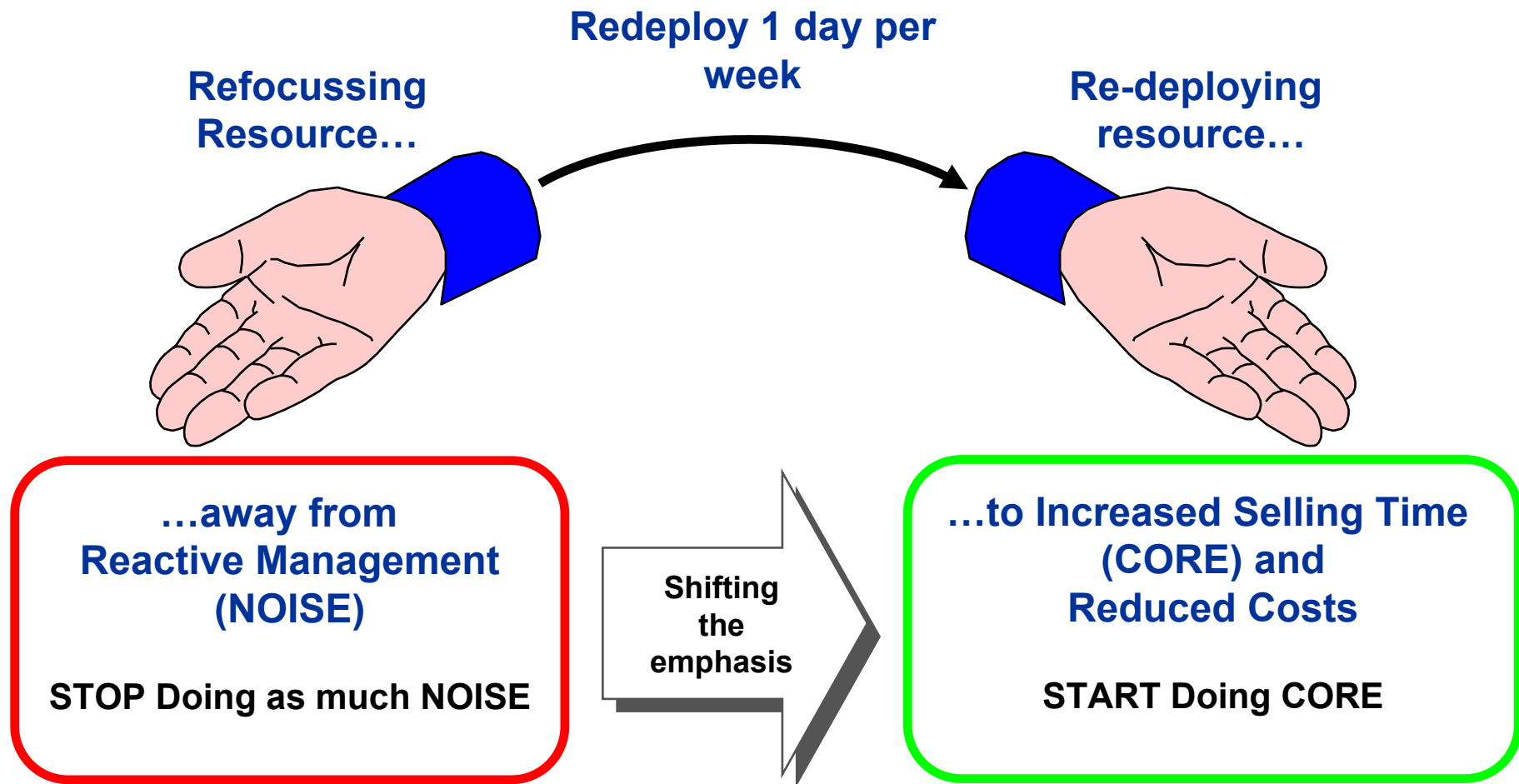
- ID key prospects in database
- Conduct meeting with customer
- Select adviser to contact
- Follow up with any leads made on the day

## Support Examples

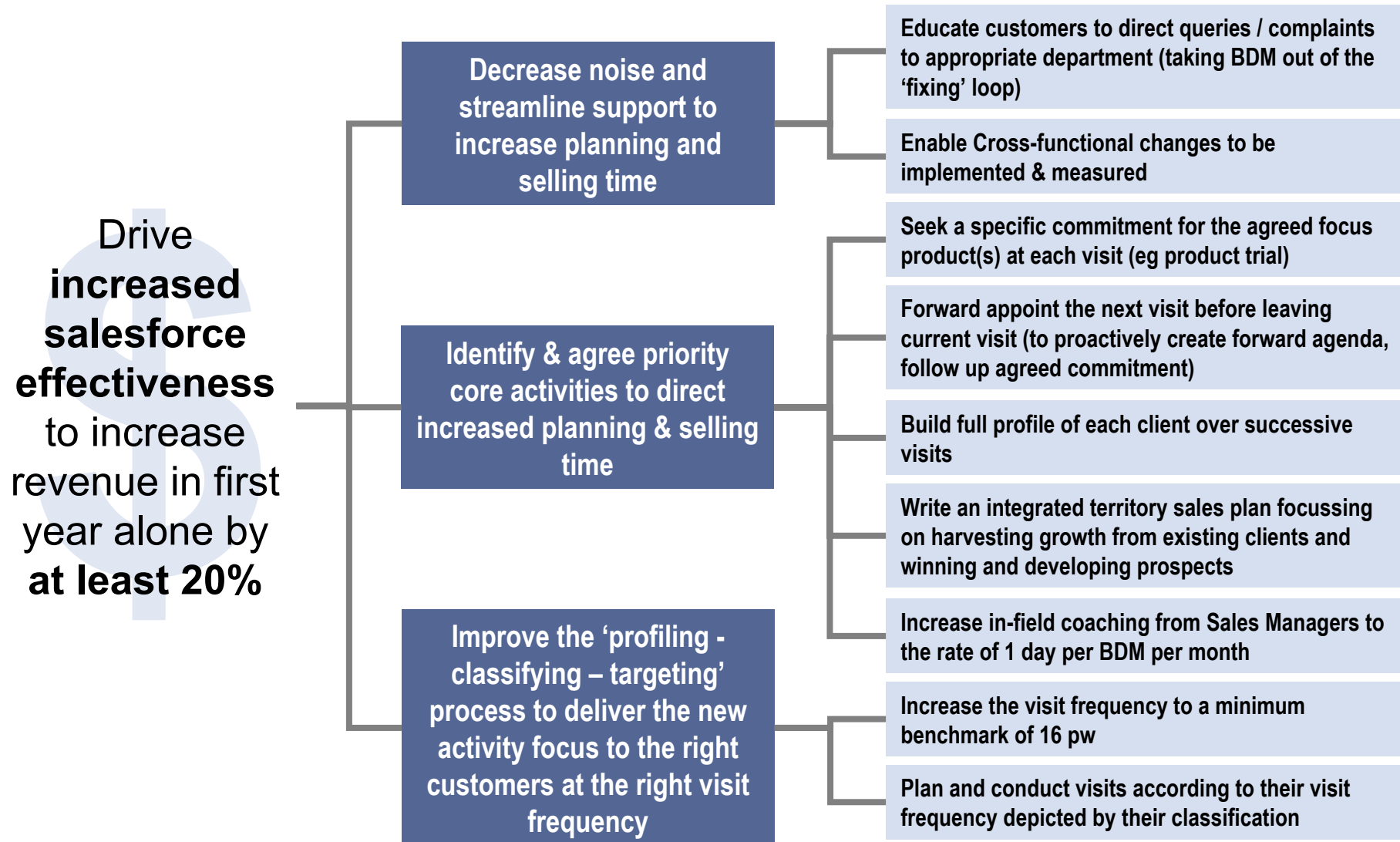
- Schedule time on ACT
- Conduct necessary research
- Travel to and from venue - car

# We refocused the time spent on Noise and Support activities to increase the available selling time and...

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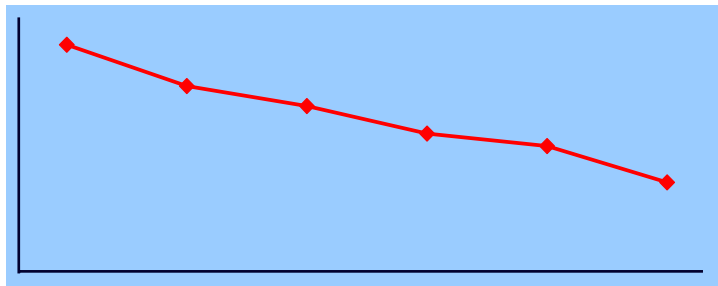
# ...targeted the sales effort on the right customers at the right visit frequency



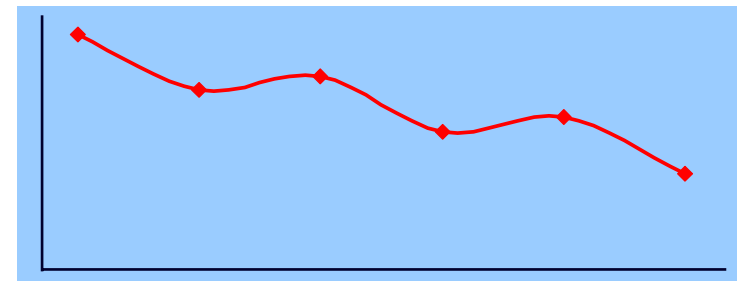
## ...and introduced a set of Behavioural Change Indicators (BCI) to quickly measure adoption of the altered behaviour targeted to decrease “noise” and increase “core” activities

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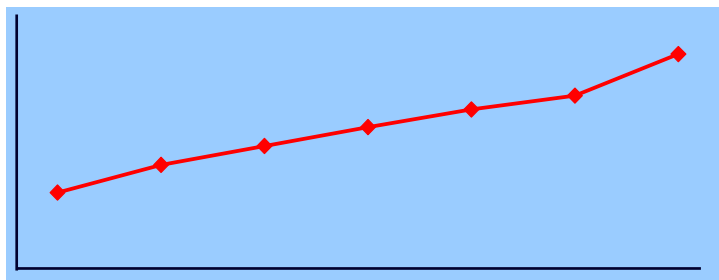
# Visits Made to Solve Customer Service Problem



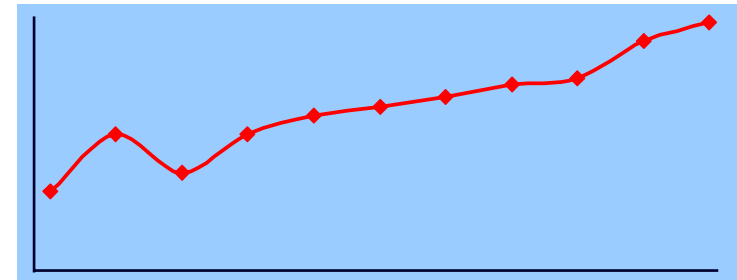
# Phone Calls to Resolve Missing / Incorrect Information to Customer



# Visits Made Where a Follow Up Visits is Appointed

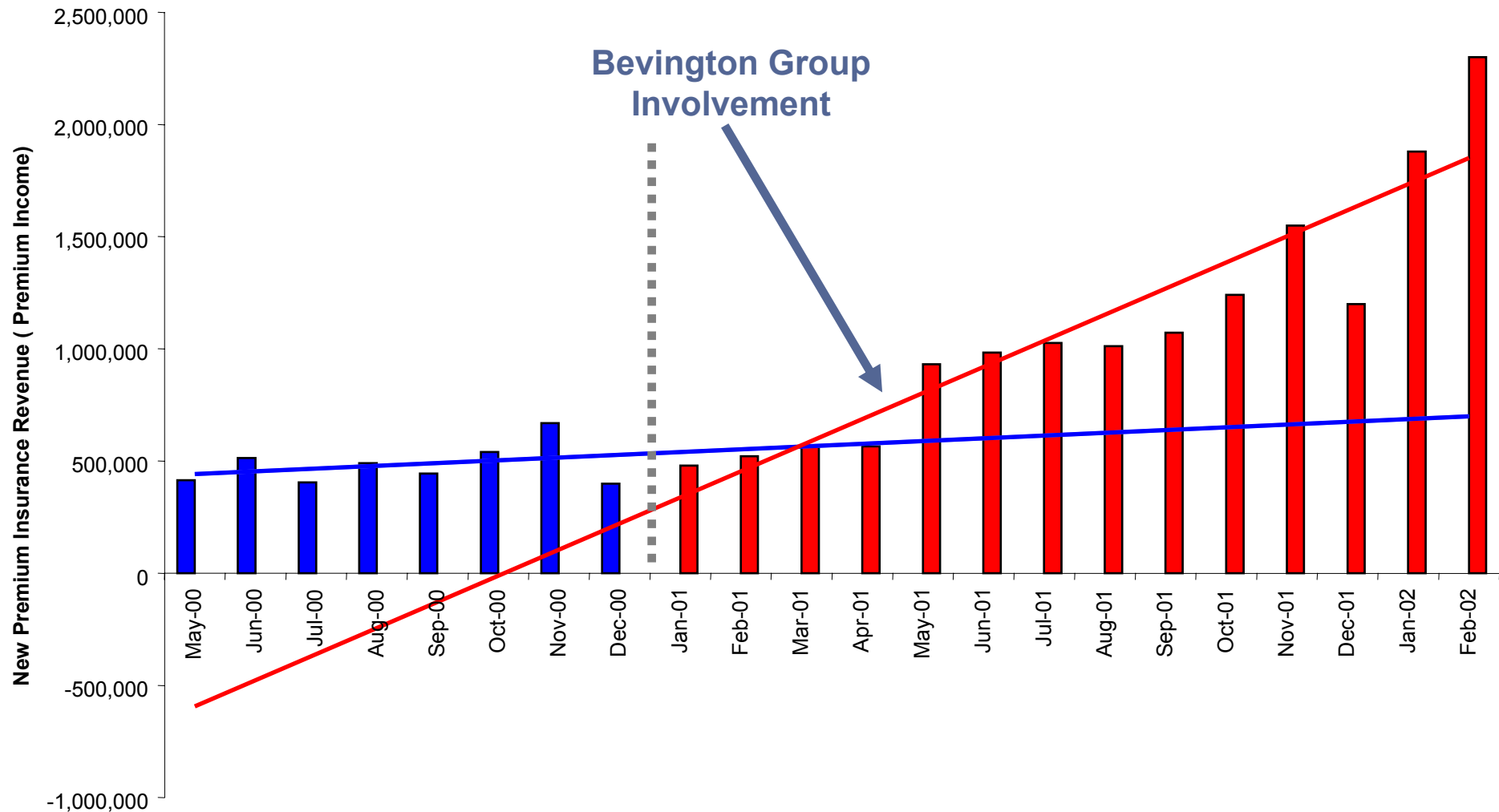


# Business Reviews Conducted With Customers

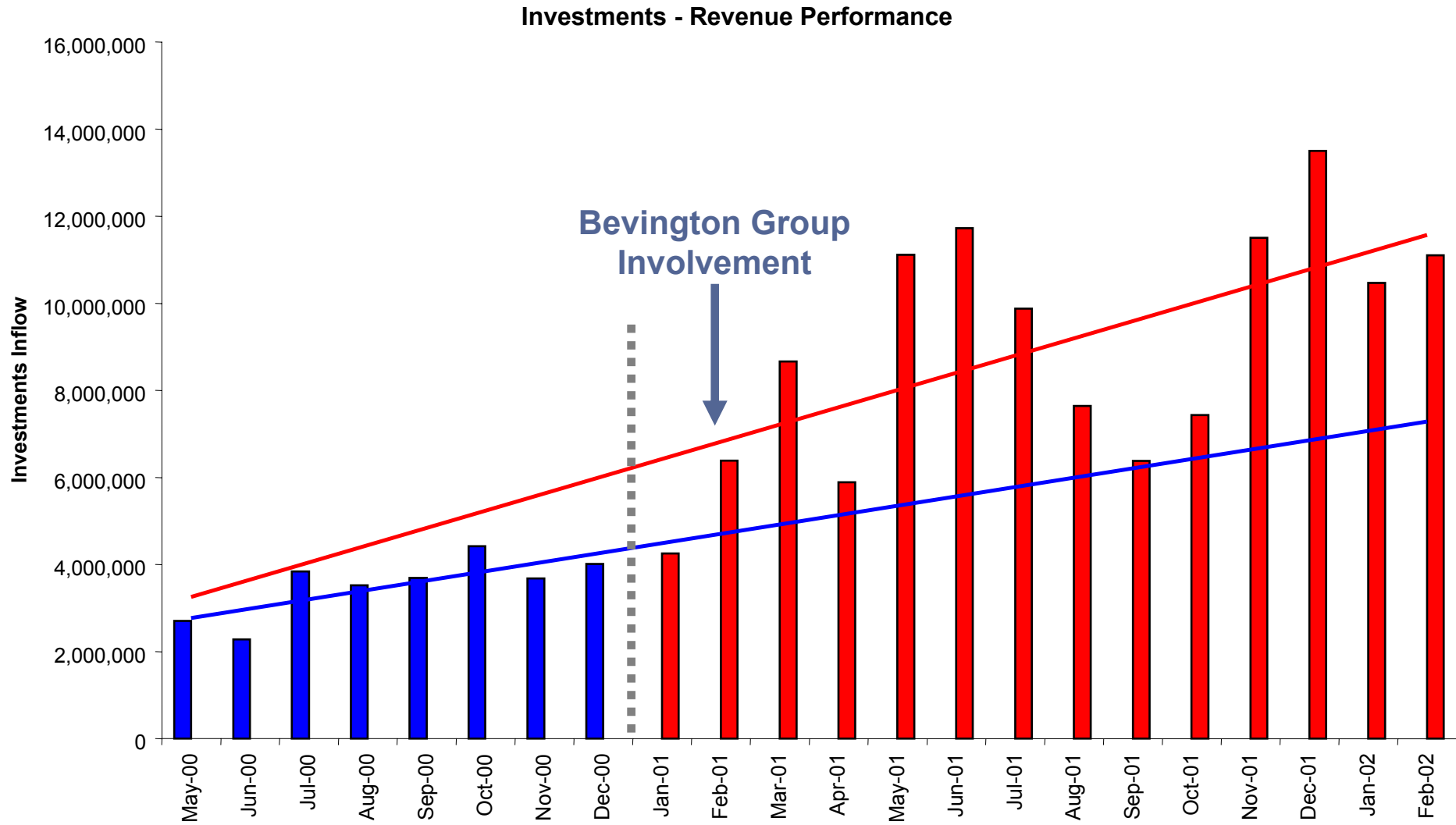


# We observed significant sales growth, with at least 50% of the growth rate being attributed to the XeP3 programme...

Insurance – Revenue Performance



# ...by both businesses involved



# Summary

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- ❑ SalesForce1 achieved its objectives of **increasing time** spent on **sales**
- ❑ Customers where **Profiled and Categorised**
- ❑ A **visit cycle** matrix was developed to **match** the classifications and **resourcing levels**
- ❑ Measured Behavioural Change Indicators (BCIs) where introduced to **enforce the behavioral change**
- ❑ Almost **immediate** and **ongoing sales increases** were observed