

# You Got Them Home Safely... Now What

**OBJECTIVE:** As of May 2020, we don't know how long the pandemic might last AND maybe we should not go back to our old mode of operation. This worksheet is designed to help YOU build YOUR plan for how to build with any Sales and Service Team ... designing to operate in a Work from Anywhere environment.

This tool is was developed in concert with the May 15, GTACC Webinar entitled "You got them home safely ... now what?". Consider running a planning exercise with your team by **1)** Sharing this worksheet & discussing with your team **2)** Ask them to review the Webinar [\[click here\]](#) and **3)** Come prepared to build-a-plan together.

## The Journey to World Class Remote Sales + Service Operations

**The Goal:** is not just to get them home, it is to run an efficient and effective Operations.:

**A)** Consider your Starting Point:

- 1 Basecamp:** WFH is fairly new (or was setup quickly), what problem should we solve 1<sup>st</sup>?
- 2 Big Ascent:** You may have had an afterhours WFH, or a "tethered" associated with a site, but steep work to do
- 3 Future Frontier:** You are preparing for all / some WFH or moving a face-to-face function to remote Ops (like Inside Sales)



**B)** Pick a Level to focus on ... the value of this exercise is to force focus and clarity:

Relevant **PROBLEMS** ... what do we need to solve? Defend why is this a Problem worth solve?

Right Order / **SEQUENCE** ... Deconstruct the Problem BEFORE rushing to Solutions. Solve the right thing in the right order.

**SPECIFIC** How to ... the value comes from how clear we are, not on random concepts / ideas.

SPECIFICALLY... What is the Problem? we need to solve for in order ... 1 2 3	WHY is it a Problem and Why in this sequence? Pretend you are defending this to the head of Finance.	Best Advice on HOW to Resolve? Come with <i>Options</i> vs one solution.
<p><b>Helper Notes:</b></p> <ul style="list-style-type: none"> <li>• Pick a Level to focus on (1 2 3), don't try to do it all.</li> <li>• Think Constraints, the biggest "can't progress until your resolve" type problems.</li> <li>• Ask people to pick 3 problem they think you should tackle</li> <li>• Ask them to do the think before and alone VS group-think takes over the discussion in a meeting.</li> </ul>	<p><b>Helper Notes:</b></p> <ul style="list-style-type: none"> <li>• WHY exactly ... is this an issue, be specific not vague.</li> <li>• WHY in this ORDER? ... what is it preventing</li> <li>• Consider a Multi-layered Plan: <i>INSIDE Operations</i> ... how your Operating System has changed, and how will you run the business? <i>INTO Ops</i> ... how you'll properly implement new; could be 1) Change Mgmt, 2) Onboard new Frontline, etc.</li> </ul>	<p><b>Helper Notes:</b></p> <ul style="list-style-type: none"> <li>• What have you seen work to address the problem.</li> <li>• What options might be possible?</li> </ul>
<p><b>An Example:</b> clarifying an example for you.</p> <p><b>1 Cornerstone Metrics</b>, the 4-6 BIG Ones that tell us our: <i>Effectiveness</i> (Sales per X, FCR, CSat) how WELL or <i>Efficiency</i> (AHT, Attendance) how MANY / FAST. The BIG Outcome metrics we need ... <i>the Critical Few amongst the Meaningful Many</i>. Why do we exist as a team? Ordering these (what people need to be exceptional at 1<sup>st</sup> 2<sup>nd</sup>, 3<sup>rd</sup> ... will also help define your new hire onboarding.</p>	<ul style="list-style-type: none"> <li>• We used to see behaviours in our Fac-based model, big Outcome Measures first will be key.</li> <li>• We can't do next level down, Behavioural metrics (both leading + lagging) if Cornerstone Metrics are not clear.</li> <li>• Great opportunity to force a reset and organize what might have become so confusing or we changed often.</li> <li>• Spoiler alert: most businesses needed this before COVID.</li> </ul>	<p><u>Solutions will vary, but force clarity:</u> 1) What do we NEED people to be great at 1<sup>st</sup>. Then, what NEXT? 2) Stop are 6; focus on Effective /Job well done metrics (CSat, FCR, Sales) + Efficiency / how fast (AHT, how)</p>

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## YOUR Worksheet

Clarity and Specifics are the goal, NOT a longer list.. you might do the thinking of all three levels ( ① ② ③ ) and then discuss the right order with your team. That is how you will build-a-Plan and a MAP, versus a big bunch of blah-blah-blah.

**ASIDE:** The Plan is only the Start ... build this like you will need to go an Implement.

SPECIFICALLY... What is the Problem? we need to solve for in order ... ① ② ③	WHY is it a Problem and Why in this sequence? Defend to the CFO / your boss Why + Why this order?	Best Advice on HOW to Resolve? An OPTION you have seen work
① <i>Organize your thinking here</i>		
② <i>Organize your thinking here</i>		
③ <i>Organize your thinking here</i>		