

The secret of how to get new staff on target fast

By Sophie Chalmers

You're about to hire a new member of staff — sales, operations, support, whatever — and your heart sinks. You know you're about to spend money on recruitment fees ... and then there's the long painful period where they stumble about in your business, 100% unproductive, continually interrupting everyone to find out how to..., where to find..., when should I...?



There is a solution. Consider these two scenarios.

1. The salesperson

A new sales person joins a business services company. On paper, the new recruit looks pretty hot. Her CV is amazing and she interviewed well. She arrives and picks up the phone on day one... and turns out to be unproductive for three months, by which time her boss is tearing his hair out and believes that hiring sales people is a waste of time because no one can ever do it as well as him. Meanwhile, she's lost confidence, and a downward spiral is set up.

2. The engineering company

In the second case, an engineering company is asked to build a machine to attach sample cosmetics to a card backing. The key component is a ram to place the glass bottle on the backing with just enough force to secure, but not break, it. On the test bench all goes well with the prototype and the customer is impressed. However, when the actual machine is installed in the customer's factory, every bottle ends up cracked. With the customer on the verge of walking away from an £80,000 contract, the design engineer proceeds to check:

- His calculations;
- The air pressure in the line is correct;
- The airline test gauge is accurate;
- The customer has not changed the bottle specification;
- The parts in the machine are all to specification.

It is only when checking the invoices that he notices his supplier has sent a different ram from the one he had ordered. He works out a new operating pressure and soon has the machine running perfectly.

What's the real problem?

Let's look at how the engineers got themselves into this jam. The problem was that there was no systematic way of checking components. The supplier only indicated a changed part by a part number, which meant nothing to the young lad in the warehouse who signed for the part and put it on the shelf. To prevent this happening again the company implemented a procedure that required:

- Incoming parts to be checked against the purchase order, not the invoice;
- Suppliers to inform them if they were sending non-specified parts;
- Non-specified parts were to be isolated until a decision was made on their use.

This procedure (also called a system or process) seems like common sense, yet its absence nearly cost this company dearly. This kind of thing is happening every day in businesses up and down the country.

Blame transfer

In both these examples, it would be easy for the solution to be missed due to blame and recrimination. The salesperson is not useless. Her boss's intuition when hiring her was correct... it's just that a key component turns out to be missing which could have this salesperson productive in a fraction of the time and, in some cases, giving the rest of the sales team a run for their money within a couple of weeks.

Meanwhile, the design engineer may have felt like kicking the lad round the warehouse, but this would not have solved anything and may have made the situation worse — the next time the lad made a mistake, he would be more likely to cover it up, with potentially greater cost implications to the company.

In both cases the people involved were never the real issue. The problems had to do with procedures. Making someone a scapegoat is never an option. Instead, look at the issues involved.

Identify the issue

In business there usually seem to be three main types of problem:

- **Inward directed**, where you are responsible and you blame yourself;
- **Outward directed**, where you blame other people or circumstances;
- **System directed**, where the procedures, or lack of them, are the culprits.

In fact, people are rarely the problem. Usually the procedure is at fault. The first two are generally system problems in disguise.

Identifying the real issue in a problem is the key. Redefine 'people' problems in terms of procedures, systems and processes. Keep digging until you find the underlying issue.

Get to the heart of the problem

There is a simple technique to find out the real issue. In essence it is to concentrate on what you can control and change. Take an example:

- You might complain 'They never do things properly.'
This is too vague and blames other people. Quantify the statement. 'How does this manifest itself?'
- The answer may be, 'The lad never checks incoming supplies properly.' This is still assigning blame. Ask yourself why he isn't checking things properly.
- The answer may be simply: 'No one has told him how, or what, to check, where and when.'
- The obvious solution might be to train him. However, this only takes you so far because what happens when the lad is off sick? He carries the information in his head so you still have a problem.

What's the way forward?

The solution is simple. The real issue is that there is no set procedure to follow that is *written down*.

Such a procedure would enable *anyone*, from the managing director to the receptionist, to take the relevant sheet from the file and follow the instructions, systematically checking off incoming supplies against orders and getting things right first time, every time. Think along the lines, 'The solution is to set up a procedure that will... (put in the result).'

What goes into a great procedure?

Let's look at the new salesperson. In theory, she knows how to sell. She just doesn't know how to sell for this business... yet. So her boss first needs to identify the 'flow'. For this he needs to know the required outcome and at what point the procedure starts. For example, it might start with an incoming enquiry for a product and the end point is a satisfied customer who has been invoiced. For example:

- Incoming call —> secure an appointment.
- Confirm the appointment.
- Prepare for the meeting.
- Run the meeting.
- Prepare a quote.
- Follow up by phone until...
- The deal is closed.
- Get the paperwork signed, so that Operations has the info they need to implement the order, and Finance has the info they need to invoice.

That's all there is to it, yes? Hmmmm, there's a bit more to it. For example, how much time will the salesperson waste drafting quotes. This should be a template. Even the email confirming the appointment should be a template. Two minutes here and there all add up — paperwork should take seconds. Meanwhile, how do you overcome common objections to setting up a meeting, let alone to buying? What are the answers to frequently asked questions about, say, payment options, discounts, delivery, installation, configuration, training, health and safety, colours, minimum quantities, personalisation... You need strategic answers to all these issues so that the salesperson is able to keep repositioning your company as the provider of choice.

A great procedure will include all the appendices any member of staff, including new members, would need. I usually create these for my clients with input from them as required. For example, you need outline 'scripts' so that new members of staff can sound professional and convincing from the word go. You need checklists, data capture forms, enquiry forms, standard letters, standard emails, FAQs, common objections, contracts, sample reports, copies of brochures, and other literature they may take to the meeting or clinch the deal. In other words, everything you need to stop people reinventing the wheel with every customer, and so wasting time.

Some systems are simple and take only minutes to create and implement. However, they are as important as the more complex ones and should not be trivialised. Ultimately, your business *is* the systems you develop. This way people can work on autopilot and keep their minds clear for the things that matter, like building relationships with clients.

Who will capture it?

The next problem is: who will capture best practice? What else should they be doing? How high is it on their list of priorities?

If you are a typical business, everything else always seems to be more urgent than writing the sales or operational procedure. It's important, yes, but it's also time-consuming; that quote, report, meeting is always more important. What's more, being *in* the business means that huge assumptions are made, so there are often gaps.

The alternative is to ask me, a disinterested (but definitely not uninterested) outsider, to help you.

How procedures will help you

Procedures are essential for several reasons:

- They are key factors when it comes to recruitment because they allow new staff to hit the ground running, and with total confidence, so they achieve more from the start.
- They set out your standards and how you do things in your business — ie your company ethos and values, not those of the individual, which may not be the same as the company's. This is vital when it comes to protecting your brand.
- They capture best practice and save huge amounts of time because everyone stops reinventing the wheel with every customer/task.
- They stop staff wasting other people's time with questions like, 'How do I do this?', 'What should I say in the letter?', 'What goes into a typical client report?' because all 'how to's and templates are there for them to refer to 24/7.
- They are vital for performance management because, should you have a performance issue, you can ask why the member of staff has not followed the procedure.
- They allow you to measure key performance indicators at a glance, so you can identify who needs more training or mentoring.

Get help now

I have created many procedures and systems for clients over the years. I've even won two business awards on the strength of my own processes — in 2000, Welsh Small Businesswoman of the Year, and in 2001, Parcelforce Worldwide/Visa Award for Business Efficiency. I know the questions to ask, and how to capture information fast and so let people get back to the important work.

If you want help creating procedures for your business, give me, Sophie Chalmers, a call on 01291 641 313 or 07711 951 343 or email sophie@activeinfo.co.uk. Your investment in procedures will repay itself over and over as you grow your business.