

To encourage knowledge retention and behavior change in a salesforce, Working Simply converted its trademark productivity program into a custom mobile learning app.

Mobile Masters

BY CARSON TATE



Management consultancy Working Simply designed its cornerstone productivity and effectiveness program—Working Smarter, Not Harder—to provide comprehensive productivity skill and knowledge development, along with coaching support. Through Working Smarter, Not Harder, participants learn how to employ strategies, tools, and best practices to regain a sense of control and enhance their ability to get work done.

The opportunity

Coca-Cola Bottling Company Consolidated (CCBCC) is the nation's largest independent Coca-Cola bottler. It makes, sells, and distributes Coke products across 11 states.

CCBCC's on-premise sales representatives are responsible for business development and maintaining relationships with existing customers. These critical team members always are on the go, responding to customer needs and meeting with prospects. They have rigorous sales goals, such as meeting a certain quota of sales calls every week—calls that lead to new business and increased revenue.

In early 2011, the sales reps were working very hard, putting in excessive hours, and not taking time off. However, sales call volume was down, along with sales numbers and employee morale. Paperwork, administrative hassles, emails, phone calls, and unmet goals were growing. Man-

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agement realized that employees were frantically busy but not especially productive.

CCBCC understood that balanced people made better employees, so the company contacted Working Simply to deliver Working Smarter, Not Harder. The program consists of a half-day instructor-led workshop, a manager coaching workshop, three months of group coaching calls, manager coaching calls, and a train-the-trainer session for sales trainers in the field.

Chris Pope, senior director of distribution and process at CCBCC, was concerned about supporting and sustaining the sales team's behavior change post-training. He requested a tool to reinforce the classroom training's key concepts so that the sales reps could retain the information and more effectively implement the new strategies and tools within their daily workflow.

In response, Working Simply developed and deployed a proprietary app for the CCBCC sales organization to strengthen the learning and behavior change gained from the Working Smarter, Not Harder program.

The solution

CCBCC issues an iPad to each sales rep to use in the field. Working Simply recognized the mobile device's potential for emphasizing Working Smarter, Not Harder concepts and supporting behavior change, and organized training content into modules for a custom iPad app.

The Working Smarter, Not Harder app provides CCBCC with instant access to the program's content, action planning templates, coaching templates, manager meeting tool kit, and "show me videos" that reinforce learning.

For example, if a sales rep wants to review one of the techniques for using

Microsoft Outlook more productively, he can watch a short how-to video. If he has a stressful day and isn't prepared for his sales calls, the app enables him to review his revenue targets and territory planning strategies.

The app is designed for use as:

- a cost-effective onboarding tool for new hires, serving as a mini version of the Working Smarter, Not Harder program
- a coaching tool for managers, giving them the ability to review core concepts and complete coaching action plans in the field
- a coaching tool for sales trainers to review core concepts and provide methods for leading training sessions.

When new reps join CCBCC, the app is a key part of their onboarding experience. And beyond training frontline sales reps, the app also provides their managers with on-demand tools to conduct training refreshers when needed, instead of waiting on the training team to do so.

The process

First, Working Simply worked with CCBCC to ensure that the app would accurately reflect the program's content needs, was easy to download, and met the company's technical expecta-

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tions. Working Simply reformatted the content from its Working Smarter, Not Harder program to integrate smoothly within the app environment, and organized it into six separate modules.

Module one: strategies for streamlining. This module contains five- to 10-minute videos that demonstrate how to use Microsoft Outlook's technology functions to streamline the calendar and tame the inbox. The homepage has a detailed list of strategies and solutions that allow participants to select the specific process they want to learn such as writing a custom rule or appending documents to meeting requests.

Module two: key concepts. This piece offers video tutorials on the program's key concepts, including invest time

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wisely, get work done, and handle information overload.

Module three: best practices. This section provides program best practices in the form of checklists and editable PDFs. These best practices include invest time wisely, territory planning, and task management.

The module also incorporates action planning templates that employees and managers can complete on their iPads during coaching conversations.

Module four: solutions. This module is formatted as a problem-solution set. The user selects the problem she is trying to solve, and the app presents the solution in the form of a video, checklist, or quick reference guide.

Module five: online course. This section contains the entire Working Smarter, Not Harder course in video format, as well as the participant workbook. The course is divided into three segments—invest time wisely, get work done, and handle information overload.

Module six: manager meeting tool kit. This module contains 12 meeting

tool kits that managers use to reinforce key program concepts. Each tool kit has a meeting agenda, as well as a video concept, checklist, or quick reference guide. Tool kit topics include email clarity, invest time wisely, and managing attention.

Once Working Simply organized program content within these modules, the company solicited feedback on the app from a group of sales reps and sales trainers. Next, CCBCC deployed the app to sales trainers, who, after becoming proficient using the new mobile tool, were prepared to answer sales reps' questions post-launch. Finally, CCBCC introduced the app to a sales rep peer roundtable group for buy-in and support.

Lessons learned and results

The first version of the app did not have editable PDFs, which made it difficult to document coaching conversations and use the templates in the field. The app was subsequently upgraded to support editable PDFs that allow managers and sales team members to create and update ac-

tion plans during field-based coaching sessions.

While employees positively received the app, CCBCC said that, in retrospect, they may have engaged the management team more regarding the functionality of the app. However, the app has been instrumental in driving behavior change and skill adoption in the sales organization. The on-premise sales representatives appreciate and heavily use the new resources loaded on their iPads.

Overall, the Working Smarter, Not Harder training program supported by the app resulted in a 20 percent increase in sales calls per day for CCBCC sales reps. And now, 1.5 years later, the calls per rep are still improving. This call increase has led to a growth in annualized revenue of more than \$2 million per year.

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Screen Shots of the Working Smarter, Not Harder Mobile App

