

Article:
Changing Behavior is More Than Just Training



Best Practices for Sustaining Sales and Service Behavior
It's more than just training!

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Question: We're trying to create a sales and service culture, one where everyone in our organization is focused on recognizing opportunities to help the customer. While the training is going well, employees keep drifting back to the old ways. What can I do?

Training is certainly a critical piece of the performance enhancement solution. Alone, it may not change behavior. Support, coaching, accountability and communication all need to be in place to ensure that you get the most from your training initiatives.

Changing a culture starts and ends with expectations. It's easy to expect people to adapt to in the short term. After all, anyone can take directions. However, when you talk about culture, it's something that is so engrained that responses to the culture are natural. You respond out of instinct because you have been conditioned to do so.

Here are examples of what some banks do to sustain their cultures and behavioral change.

Define What Sales and Service Means to Your Bank

Communicate expectations before the training begins. Why is the organization conducting training? What difference will it make and what role does everyone play? Make sure that training supports performance expectations. If the employee is unsure of how the skills translate to their roles, they will be very unlikely to implement them.

Create Service and Sales Standards

Standards are not rules. They are guidelines that all employees strive for. It is best if all stakeholders are involved in this process. Training sessions provide the ideal format for creating standards. Standards should be specific. Don't say, "We want to be a customer-focused and sales driven organization." What does that look like? Instead, state what you will do as an organization, how you will measure success and what specific actions everyone will take. Then, integrate the standards into regular performance feedback and review sessions.

Don't Confuse Sales and Service Cultures with Direct Sales Roles

Not everyone has to be a salesperson, just sales focused. I have seen totally competent people become paralyzed by over zealous expectations. For instance, it may be unrealistic to ask backroom functions like bookkeeping and loan processing to keep a book of business. However, they often encounter many opportunities to help grow and retain customers by making specific recommendations and referrals.



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Know When Training Is or Is Not the Answer

Make sure that you don't invest in training when it won't solve your problem. On the other hand, do invest in training when it will. Ask yourself, if training is the solution, what will happen afterward that isn't happening now?

Introduce Training in Small Segments with Opportunities for Coaching

When learners are introduced to one or two skill sets at a time, it provides a richer opportunity for them to focus and integrate that skill on the job. Between sessions, learners practice what they just learned while manager's coach and reinforce. Then, experiences are reviewed at the start of the next session before building on the next skill set.

Use a Blended Approach

Time is valuable and it is difficult to pull people away for training. Consider using e-learning or self-study as the means for imparting information. Conserve face time for practice, role play, discussion and coaching. Branch or department meetings provide a terrific venue for face to face coaching and debrief.

Communicate Regularly

If you have children, you know that the first time you ask them to clean their room it's ignored. The second or third time it's done. The same is true with culture. You need to communicate the message regularly so the audience knows that it's not going away and to reinforce best practices. One of the best ways to communicate is to publicize successes. Share specific examples of successful actions in the company newsletter or intranet. Consider a sales and service committee of peers from various levels and departments to oversee communication.

