



BEST SERVICE INTERNATIONAL



Private Bankers Sales Performance

DIAGNOSIS AND SOLUTION PROPOSAL

Agenda



1. Context Recap



2. Methodology
and Trend Spotting



3. Proposed
Solution



4. Solution Impact

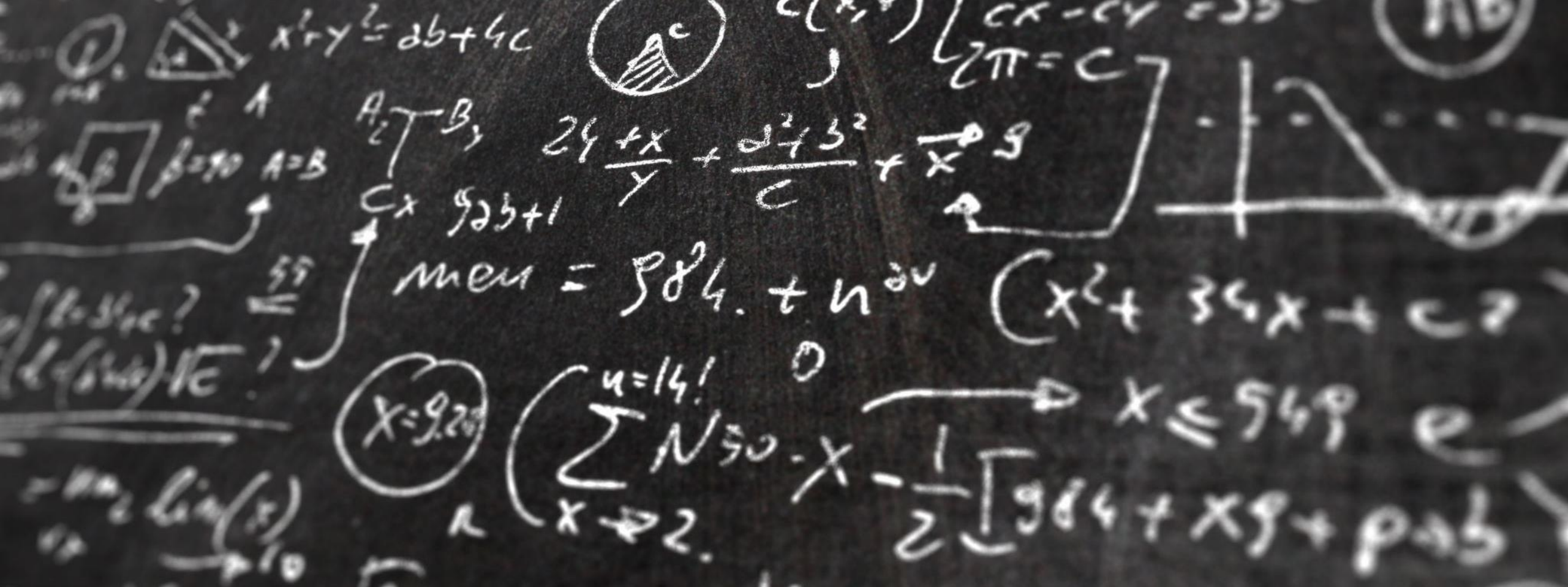
Context Recap

Business Problem: Private Bankers not reaching sales goals (3 proactive sales a day).

Private Bankers are contracted to deal with inbound sales/ service calls, and designate time to make proactive sales.

Internal findings show:

- Bankers are prioritizing inbound calls over proactive engagements.
- There is a lack of structure in their day.
- Bankers have low job satisfaction due to the change in their role.
- Their proactive calls are not welcomed by customers who treat their calls as if they are spam calls.



Trend spotting and methodology

Methodology



Transformed the data to get a daily proactive sales rate for each month for every private banker; and removed any that were not allocated sales by the Portfolio Tracker Tool from the sample.



Confirmed the drop-off in daily sales rate across the board but noticed variance in the performance of employees both before and after the pandemic.



Top performers before Covid had 2 out of the first 3 months recording a rate of above 3 proactive sales a day.



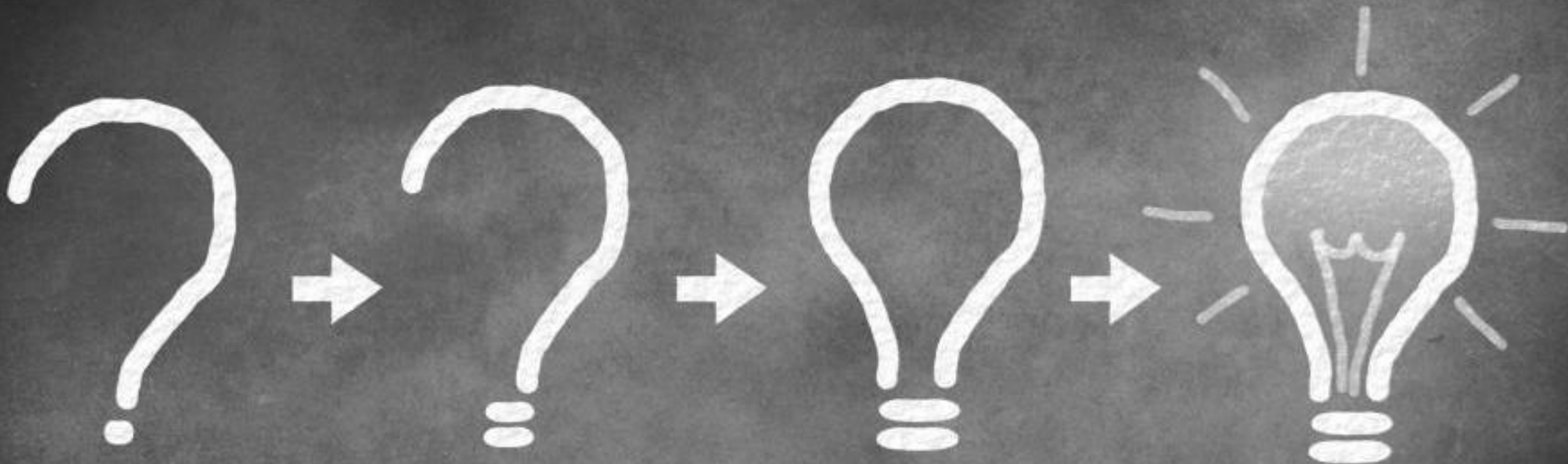
Top performers post-Covid are private bankers that had a rate of above 3 proactive sales a day for at least one month, or have an average post-Covid rate of above 1.5.



There is a strong correlation between pre and post Covid top performers, and the Team Leaders served as a very good predictor of performance.

Top performers by Team Leader

Team Leader	Top Performers pre-covid	Top performers post-covid
John Smith	54%	25%
Thabo Matangu	67%	67%
Sarah Jacobs	67%	44%
Jessica Grove	25%	0%
Bonolo Tshube	25%	0%



Top Sales Team Challenge

The Solution

Top Sales Team Challenge



Program to incentivise the team to make proactive sales. Along with incentivising the team the aim is to form a habit, meaning the challenge doesn't need to go on indefinitely for it to be effective.



Teams are in competition against each other, with the team that has the highest proactive sales rate getting the last Friday of the month off. Teams can't win 2 months in a row.



Each team will be allocated a rotating 1-hour slot for making proactive sales so that inbound calls do not get neglected.

Alternating Slots Example

Proactive Sales Slot	Monday	Tuesday	Wednesday	Thursday	Friday
09:00 - 10:00	Team John	Team Bonolo	Team Jessica	Team Sarah	Team Thabo
10:00 - 11:00	Team Thabo	Team John	Team Bonolo	Team Jessica	Team Sarah
11:00 - 12:00	Team Sarah	Team Thabo	Team John	Team Bonolo	Team Jessica
12:00 - 13:00	Team Jessica	Team Sarah	Team Thabo	Team John	Team Bonolo
14:00 - 15:00	Team Bonolo	Team Jessica	Team Sarah	Team Thabo	Team John

Solution Impact



Paid time off has been shown to provide a 20% increase in productivity and 15% improvement in sales performance.



Team managers are incentivised to innovate or learn from others on how to improve team performance.



Provides structure to the Private Bankers' days.



Job satisfaction from the feeling of contributing to a team, as well as from the incentive.



Promotes fair, healthy, and controlled competition.



Potential negative impact: The one day lost could potentially lose the business money, but with a valid sales rate of above 80% and a potential increase of above 3 sales per day, the proactive sales revenue could offset that loss. The period off can be adjusted to the appropriate offset value.



Thank You

Appendix

Incentives Research

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Peoplebox (2023) Employee Performance Metrics. Available at: <https://www.peoplebox.ai/blog/employee-performance-metrics/> (Accessed: 24 September 2024).

Daily Sales per Employee

Name	Employee Number	Total sales		January	February	March	April	May	June	July	August	September	October	November	December	Team Leader	Post April Average	Total average valid daily sales
Susana Chaffins	D217104		424	6,82	5,55	3,59	0,63	0,50	0,90	0,35	0,25	1,14	0,27	0,00	0,00	John Smith	0,45	84,91%
Asley Loch	D198743		685	3,09	7,85	4,91	2,26	0,80	1,67	0,09	2,75	3,81	0,77	1,95	3,32	Thabo Matangu	1,94	83,21%
Hedy Kimmell	D215604		526	4,55	3,20	2,14	1,21	2,05	2,14	2,57	1,25	2,71	0,45	0,90	1,89	Sarah Jacobs	1,69	82,32%
Martha Frechette	D226001		248	3,59	3,55	3,14	0,00	0,00	0,00	0,00	0,00	1,38	0,00	0,00	0,00	Jessica Grove	0,15	84,27%
Luke Torian	D205062		454	2,18	4,25	1,00	0,68	1,15	1,24	2,87	2,15	4,00	0,41	0,71	1,05	Sarah Jacobs	1,59	85,68%
Julee Oler	D215099		282	3,36	3,20	2,32	1,79	1,00	0,24	0,00	0,30	0,48	0,68	0,14	0,00	John Smith	0,51	90,07%
Chet Mcshan	D176968		52	1,64	0,80	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	Thabo Matangu	0,00	82,69%
Beulah Eastman	D235282		299	8,95	1,30	2,82	0,32	0,20	0,00	0,09	0,00	0,10	0,00	0,00	0,00	John Smith	0,08	67,22%
Romeo Trinidad	D212664		1	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,05	Jessica Grove	0,01	100,00%
Krysten Numbers	D215606		594	3,91	0,65	4,91	1,37	3,30	2,57	0,00	1,35	1,86	3,73	2,43	2,21	Sarah Jacobs	2,09	84,18%
Jeffry Wagers	D158378		4	0,00	0,00	0,00	0,11	0,00	0,10	0,00	0,00	0,00	0,00	0,00	0,00	Jessica Grove	0,02	75,00%
Lashay Ames	D215026		189	1,73	1,70	2,68	0,00	0,65	0,19	0,00	0,10	0,00	1,32	0,43	0,05	John Smith	0,30	80,42%
Cordell Bertucci	D215097		249	3,59	1,40	1,41	0,95	0,80	1,48	1,04	0,45	0,33	0,00	0,19	0,11	Bonolo Tshube	0,59	85,14%
Kallie Wheelwright	D217093		439	2,59	5,20	4,23	0,00	1,15	1,71	1,00	1,30	0,00	0,00	2,10	1,74	John Smith	1,00	86,79%
Laurie Cammack	D217092		340	9,64	3,60	2,55	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	Bonolo Tshube	0,00	82,06%
Ailene Mansir	D215473		288	2,77	1,85	3,82	0,53	0,60	0,67	0,00	0,05	0,29	1,59	0,76	0,63	John Smith	0,57	86,11%
Paulette Hardie	D216280		486	4,68	2,00	6,82	1,05	1,10	1,95	1,70	1,35	1,10	0,00	0,00	1,11	Bonolo Tshube	1,04	81,07%
Kiara Ridout	D215074		536	5,23	5,20	0,00	2,11	1,05	1,62	0,00	1,00	3,05	1,82	3,14	1,68	Sarah Jacobs	1,72	82,09%
Shenna Charleston	D214430		131	2,36	3,95	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	Bonolo Tshube	0,00	56,49%
Merle Brotzman	D216060		2	0,00	0,05	0,00	0,00	0,00	0,05	0,00	0,00	0,00	0,00	0,00	0,00	Sarah Jacobs	0,01	50,00%
Kit Mcqueen	D122609		554	4,59	6,20	6,95	0,21	1,95	0,19	0,00	0,00	0,29	4,18	0,86	0,68	John Smith	0,93	84,48%
Angeline Simpkins	D215474		261	2,86	3,15	0,00	0,95	0,80	0,19	0,00	1,00	1,29	0,00	1,33	1,16	Sarah Jacobs	0,75	83,91%
Yon Coelho	D218882		130	3,59	1,40	0,86	0,00	0,00	0,00	0,00	0,05	0,00	0,05	0,00	0,11	Bonolo Tshube	0,02	80,77%
Dino Jacox	D195038		343	1,95	2,65	2,00	1,16	1,05	1,52	0,30	1,45	0,81	0,86	1,76	1,00	Bonolo Tshube	1,10	79,88%
Tisa Prieto	D197761		486	2,41	3,95	2,05	1,47	1,75	1,10	2,00	2,50	2,10	0,68	1,14	2,32	John Smith	1,67	79,63%
Lorine Decosta	D216360		520	9,91	7,50	6,14	0,00	0,00	0,00	0,00	0,00	0,81	0,00	0,00	0,00	John Smith	0,09	86,15%
Collette Westrick	D219016		229	3,86	2,25	0,00	1,26	1,00	1,10	0,00	0,65	0,86	0,05	0,00	0,00	Bonolo Tshube	0,55	82,10%
Leeanne Sohn	D227647		889	1,23	4,55	16,77	2,74	0,45	0,38	0,22	0,40	1,24	4,86	6,29	2,89	Thabo Matangu	2,16	84,03%
Marquis Macmaster	D217107		386	4,59	4,15	0,00	1,89	1,15	1,14	0,00	0,80	1,52	0,00	1,48	2,11	Sarah Jacobs	1,12	86,27%
Mistie Elzy	D184243		582	4,14	6,40	4,59	1,00	1,75	1,71	0,83	1,05	2,19	0,77	1,71	1,74	Sarah Jacobs	1,42	86,43%
Bronwyn Beaton	D217055		401	3,36	2,45	5,27	0,00	0,95	1,00	0,00	0,00	0,00	3,41	1,76	0,53	John Smith	0,85	91,02%
Carlyn Vandorn	D214405		102	3,59	1,15	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	John Smith	0,00	83,33%
Armand Theobald	D215608		24	0,00	0,00	0,00	0,00	0,00	0,24	0,00	0,00	0,00	0,82	0,00	0,05	John Smith	0,12	100,00%
Deedra Yeldell	D223172		81	3,45	0,25	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	Bonolo Tshube	0,00	62,96%
Herminia Malsam	D127811		5	0,00	0,00	0,05	0,11	0,05	0,05	0,00	0,00	0,00	0,00	0,00	0,00	Jessica Grove	0,02	100,00%
Stephan Felan	D214376		447	1,59	8,05	3,95	0,42	1,35	1,43	1,17	0,40	0,76	0,00	1,71	0,63	Sarah Jacobs	0,88	90,60%
Breanna Traxler	D194371		349	9,45	4,60	2,23	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	John Smith	0,00	85,10%