CallSource®

Establishing Goals

1. Determine goals based on business objectives
2. Set specific goals
3. Develop a timeline for accomplishing each goal
4. Communicate goals to each team member
5. Create accountability through regular monitoring and employee feedback
6. Practice continuous improvement

Setting Goals

Goals are the target of a business' strategy. They guide and measure an organization's growth and operational efficiency.

Successful leaders work with their team to set goals and ensure continued progress by establishing accountability. Setting and communicating goals to team members communicates performance expectations in objective terms.

Your phone handles are a vital part of the business and help you achieve your goals as a whole. They are the first person potential customers will speak to and leave a lasting impression on your business.

Assessing Current State

The first step in setting goals is to analyze your current standings; once you identify where you are you can then begin thinking of where you want to go.

Organizing the data in terms of the client acquisition cycle may prove helpful.

Awareness	Connection	Acquisitions	Throughput
Prospect Calls Online Reviews	Conversion Rate Appointments Set Brand Experience Outbound Calls	Sales	Revenue

As the leader, you will decide if you wish to set goals for each of these or only those that are most pertinent to your strategy. Setting multiple goals within each category may also be needed.

Select a timeline for the goals. Quarterly goals, varying by season, may be necessary to account for seasonality. It is recommended selecting a timeframe that is manageable.

Awareness

Prospect calls reflect the success of marketing efforts. Identifying goals and measuring prospect response to direct marketing efforts provides a target and helps manage the marketing efforts. In simplified terms, prospect calls represent the maximum potential for new client acquisitions. The business cannot grow faster than the phones.

One way of acquiring more awareness is through online reviews. Online reviews likely include two components.

1. The total number of reviews on sites most important to the business.
2. The average score of all reviews.

Client endorsements of your service are an important marketing function. It may not be traditional marketing, but it can result in driving prospects to call your business.

Connection

The Connection phase is the first opportunity for your business to speak with a prospect and present a brand experience. CallSource has identified three potential prospect outcomes during the initial connection:

- Fostered (appointment set)
- Lost (the prospect defects)
- Nurtured (no appointment set, but a positive brand experience was delivered)

Conversion Rate

Appointment setting effectiveness on the initial call is a vital metric of client acquisition and revenue. High success rates shorten the client acquisition cycle and provide greater acquisition opportunities. This has proven to be the most costly area of growth constraints, for some CallSource clients. Effectiveness is measured by the Conversion Rate.

Lead nurturing often requires the step of an outbound

call to the prospect who did not book an appointment. This provides a second chance to foster the relationship by booking an appointment. As part of the assessment stage, measure the frequency outbound calls are made per missed opportunity and/or the amount of revenue generated.

Outbound Calls

If outbound calls are not currently being attempted, assess its potential role in helping the organization meet its client acquisition or revenue goals. Outbound calls may represent an opportunity to acquire additional clients without increasing the marketing spend – and subsequently reduce client acquisition costs.

Brand Experience

Brand experience can be measured using CallSource's Telephone Performance Analysis (TPA) report or by the business leader reviewing call recordings. Success at communicating the value of the business to potential clients is the goal. Objective standards help team members satisfy this objective.

Establishing Goals

After establishing the current performance baseline, you may determine your desired goals. In some areas, performance improvement will be needed. This may require a separate plan.

Your office's areas for improvement may be evident, or some assistance may be needed. When analyzing metrics on CallSource's online platform and Owner Summary Reports, your areas for improvement or "red flags" should become apparent.

The goals for each phase of the sales cycle should reflect the organization's total new client acquisition or revenue targets.

Focusing on specific areas, rather than all areas simultaneously, helps create a manageable project. Within certain phases of the cycle, you may choose to focus on improving only specific metrics. Focusing on improving the conversion rate, not the number of appointments set, in the connection phase of the cycle is one example.

The number of areas – and specific goals – chosen should be manageable for your business given the exact circumstances, staffing, and market variables. You may find some areas require immediate action or there is a logical progressive order. Over time you can refocus your attention to other goals.

The goals you set should reflect the overall business objectives. When creating your goals consider the following questions:

- What do I want to accomplish?
- Why is this important?
- Who is involved?
- How will this be accomplished?
- What obstacles are there to achieving my goal?

Start with the End in Mind

Individual goals within the client acquisition cycle must reflect the business' goals.

Consider the necessary appointment conversion rate needed to set the ideal number of appointments that will lead to client acquisition and revenue goals. This requires a certain marketing response (prospect calls).

By starting with the desired end result, and then identifying the target rate for each area to support that objective, many individual goals will become clear.

Set Specific Goals

Setting specific, measurable goals and avoiding ambiguity creates an environment for success. For example, "increase conversion rates" is a vague goal. A conflict of understanding may result by allowing individual interpretation. Creating a culture of accountability is not possible in an ambiguous climate.

Increase conversions from 45% to 60% is specific.

Well-defined goals establish clear expectations. Anyone on your team, including new employees, will understand what is expected of them.

Once you determine what the goals are, it is crucial to communicate these goals to each member of your team. Consistently sharing the team's actual numbers compared to their goals reinforces the importance of meeting the goal. It also allows you and the team to monitor individual and team progress and identify what steps need to be taken to reach the goal.

Establish an Improvement Timeline

It is essential to assign a reasonable deadline for meeting your goals once they have been determined. Without an end date, it is difficult to enforce that the goal will be met. This also creates ambiguity for your team.

For example, if your office is currently converting 60% of prospects to appointments, but you would like to improve the conversion rate to 85%, this cannot be achieved in a one month period. Both short term and long term goals need to be implemented in this example. Increase the conversion in small increments each month. Perhaps try improving by 5% monthly, until you reach your goal of an 85% conversion rate within 5 months.

While it is important to share the long-term goal(s) with the call handlers, it is vital to then break down the plan of attack to reach this overall goal by using short-term goals. By asking your team to concentrate on short-term goals while advancing to the end goal, it makes the effort seem achievable. Each step can be celebrated.

Asking your team to improve their conversion rates by 25% and not offer additional information, it may make the goal feel unobtainable and therefore lower the morale. This will result in a counter effect.

Set Steps to Achieve Goals

Once your improvement timeline is complete, set the steps of how your team will achieve each of these goals. These steps might include having call handlers take certain webinar courses, review their report card and TPA scores monthly and internal training.

The steps you create should correspond to a specific action plan and be given to employees to keep handy. This way, they will know what steps to achieve according to your schedule. There will be no surprises when the deadlines approach and they will know with clarity what steps they need to take.

With every mini goal, there should be some training and feedback for the call handlers to go along with meeting these goals. Whoever supervises the Customer Service Representatives should ultimately be responsible for ensuring their success.

Culture Shift

Recreating your business culture may be necessary to achieve your goals. Your exact circumstances may require significant alteration to how you manage your team or no change at all. Only you as the business' leader can decide. Conducting a careful analysis of what will be needed to reach your goals is generally a good idea. Here are some questions to ask:

- Are my team members invested in the success of the business?
- Are my team members motivated to stretch and achieve new levels of success?
- Do my call handlers know their role in the sales cycle is to set appointments?
- Can my team members correctly answer what their goals are?
- Can my team members correctly answer what the company goals are?
- If a team member falls short of their goals, are there specific steps that will be taken?

If "No" is often the answer to these questions, meeting your goals may require a shift in culture. Cultural shifts do not need to be frightening or painful for your team. Nor does it require you to shed what makes your business a fun and rewarding place to work. Understanding the nature of the change, setting clear goals and expectations, and communicating effectively with your team will create a smooth process.

Creating a consultative sales culture and a culture of accountability has helped many CallSource clients reach their performance goals.

Creating a consultative sales culture simply means that call handlers understand that their role is to set appointments for qualified prospects. This means making an effort to understand the caller's needs, building value, and asking for the appointment.

A culture of accountability is not designed for the sole purpose of punishing poor performers. Strong performers will benefit as their efforts will shine through and be recognized. Each team member will understand his or her role and how that role impacts the success of the organization. Standards and goals will be defined, and each person will work to achieve those goals. Those falling short will accept the need for additional coaching and training and make an effort to learn.

Implement Ongoing Check-ins

To make sure you are achieving your goals, plan on holding regular "check-ins" with staff. These might be daily, weekly, or monthly. Your monthly Owner Summary Report provides a perfect opportunity to sit with team members and review their scores.

Choose what best suits your business, and communicate the schedule of the check-ins with your call handlers as well.

Check-ins can be included in your action plan and given to employees ahead of time. This will hold them accountable so that they will be continuously working towards improvement.

By checking in, whether these might be held as a team meeting, individual meetings, looking at CallSource reports weekly, or a mix of all of these, make sure there is a system in place to keep your goals in check and on track.

Keep Aiming Towards New Goals

Even once you have hit your goals, make sure to keep aiming to be better or stay the best. Your goal may be a continued improvement or maintain consistency. No matter the case, always have a goal in mind and make sure to relay these to your CSRs. Post them somewhere, hold ongoing meetings, and stay on top of the progress. Once you have achieved your major goals, you are on the path to stay at the top.

Never become complacent. By continuously setting goals you will become as successful as possible.

CallSource Reports and Benefits

1 Telephone Performance Analysis (TPA)

- Measures the customer's phone experience

2 Dashboard

- Displays total appointments set and missed opportunities for the month

3 Traffic Analysis

- Provides appointment conversion rate and total number of appointments by employee

4 Missed Opportunities

- Alerts you to prospects who weren't booked, but could have been