

Implementing Smart, Effective Remote Strategies

Transitioning Your Sales Teams to Remote Operations During a Crisis



Highlights

Planning for a successful, full remote deployment requires significant planning, including:

Pre-planning Actions

- Develop Overall Program Plan
- Involve Employees and Clients
- Test & Rehearse

Implementation

- **Conduct regular video "huddles":** Morning Standup, Mid-Day Check in and Closing Wrap-up
- **Continued Well-Being** Encourage physical & mental fitness exercises and consistent communications from the leadership

"The huddles are very valuable. They keep me engaged and less isolated."
-- SDR

"I felt very prepared to work from home. I was given access to all the tools and resources I needed to be successful."
-- Account Executive

COVID-19 is bringing untold turmoil to people's lives and to businesses both large and small. Sales teams are especially impacted, as they produce the life-blood of all businesses -- revenue. During a crisis, sales operations must function seamlessly to manage existing opportunities, but to also build pipeline to guarantee future success.

While many companies today have lenient WFH policies, implementing this practice across an entire sales division demands additional considerations. Especially when considering alignment between Sales Development and/or Inside Sales Reps, Account Executives, sales operations and sales leaderships rely on consistent close personal communications. Moving to 100% remote strategy can be dislocative and increase feelings of isolation and threaten productivity.

At qualifiedMEETINGS we developed a strategy that can be implemented in a crisis like the one we face today, to efficiently allow all employees to work remotely from their homes with no major disruptions to our business processes and customer service delivery.

Here is an outline of the key components we have constructed.

Planning

These important steps were critical to our successful remote strategy. to

- ▶ **Develop an overall Program Plan:** We began by mapping out what our employees would need at their new home office, such as: technical equipment, internet/wireless connections, access to corporate assets, etc. The need for more licenses, VPN access, and other collaboration tools were all considered.
- ▶ **Involve Employees and Clients:** We included our staff in the plan review process and incorporated feedback. We talked directly with our clients and inquired what their biggest concerns were, and addressed those in the plan.
- ▶ **Test & Rehearse the Plan:** A vital component was to fully test the process and conduct a complete dress rehearsal. This process was instrumental in being able to identify and fix glitches before we deployed the plan.

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Deployment

Once our employees were working remote, we continuously strive to reinforce and build a virtual sense of community and support. To reach that goal, we host a series of **three, 15-minute video meetings** each day which include every employee by team (3-5 people per team).



- **Morning Daily Standup:** A status check on people and systems asks these questions: Are our people healthy (physically and mentally) and are we ready to serve our clients today? Are our tools in place and functioning? An open discourse is encouraged, with issues logged and assigned for follow-up and resolution steps announced in the following morning's standup call.
- **Mid-day Check In:** Are we still engaged? How is our performance? What challenges have emerged? How are teammates dealing with issues as they arise?
- **Closing Wrap Up:** Re-check on people and systems. Any issues? How were our numbers? What could we improve on? How can we continue to support our clients? What might we do differently tomorrow?

These short video huddles serve to reduce the social isolation often felt by remote employees, especially ones not accustomed to working away

from their teammates. The visual aspect is critical. Employees and leaders can see and interact with their staff and teammates. This reinforces that no one is alone.

Continued Well-Being

We further look at how to maintain a connection between employees, which we feel is essential to our staff's overall health and continued performance. Here are several methods we promote:

- **Encouraging physical fitness and mental well-being.** This will dramatically improve performance and resilience during these trying times. Online well-being programs such as [Grokker](#) can be a powerful tool in helping isolated employees maintain physical and mental health and should be considered a beneficial augmentation to leadership contact. (Note that Grokker is offering its service for free during the COVID-19 outbreak)
- **Continuous connections from the leadership teams.** Many of the challenges of working remotely (lack of community, communications challenges, maintaining trust and reliability, practicing accountability, preventing loss of productivity) can be mitigated with a solid, caring leadership. Frequent group and one-on-one check-ins with employees working remotely during a crisis can help your workforce maximize productivity during offsite operations.

Sales and sales operations teams must move quickly and responsively in this or any crisis to continue serving their customers, meet employee needs, and grow into the future. With working remote a key part of today's crisis, implementing a reasoned, effective, and strategic program that keeps employees productive and connected is more important than ever.



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