

CASE STUDY

# WORK SMARTER, NOT HARDER

working/  
Simply®

# Organizational Development Done Right:

*How to Boost Productivity and Increase Sales*

## EXECUTIVE SUMMARY

*The Coca-Cola Bottling Co. Consolidated on-premise sales team achieved a 20% increase in sales calls, increasing revenue.*

- Coca-Cola Bottling Co. Consolidated (CCBCC) is the largest independent Coca-Cola distributor in the United States.
- Their on-premise sales team had too many tasks pulling them in different directions. They were working late and still not making their sales call goals.
- Carson Tate of Working Simply customized her Work Smarter, Not Harder program for the on-premise sales team at CCBCC, reinforcing the program for ongoing success with training for managers, regular peer group collaboration, and an interactive iPad app.
- Sales team members, including management, learned to manage hidden pain points in their day, getting more done and getting home at a reasonable hour.

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*By being better organized and having a more defined daily plan, reps are able to make more sales calls per day. As a result, our total sales calls per week are up over 20% from the prior year. These additional calls per week should easily translate into \$2 million in additional revenue per year.*

**— Chris Pope, Coca-Cola Bottling Co. Consolidated**

## THE PROBLEM: BUSY-NESS

CCBCC, the nation's largest independent Coca-Cola bottler, makes, sells, and distributes Coke products across 11 states. Their on-premise sales representatives (OPSRs) are a keystone of business operations. They are responsible for not only generating new business, but also for cultivating relationships with existing customers.

These critical team members are always on the go, responding to customer needs and meeting with prospects. In addition, they are assigned internal goals, such as making a certain quota of sales calls every week— sales calls that turn into new business and increased revenue.

## WHEN END OF DAY IS NEVER

The OPSRs were working very hard, often putting in excessive hours and not taking time off. Still, sales call volume was down, so were sales numbers. Morale was down. Paperwork, administrative hassles, emails, phone calls and unmet goals were piling up. Management realized that their team members were frantically busy but not terrifically productive.

The CCBCC management team was concerned. In addition to productivity, they were worried about their people. OPSRs were working all hours, catching up on their email late at night. CCBCC knew that balanced people made better employees. Management wanted their people to be home at night with their families.

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*My most significant change is that I have saved time, especially on the weekends. I am better able to manage my time with my family.*

— CCBCC OPSR

## A RIDDLE

**Q:** What do you call the person who handles a steady stream of emails on a mobile device, directs delivery and fulfillment staff, makes initial sales calls to prospects, keeps in touch with existing customers about orders, promotes new products and offers, and is often the frontline troubleshooting responses to equipment and supply problems?

**A:** A CCBCC on-premise sales representative.

**Like a lot of people in job roles that require being responsive to customers, the OPSRs had difficulty getting all of their work done everyday. They needed to be more efficient and prioritize tasks.**

Senior Vice President of Sales and Marketing Robert G. Chambless and Chris Pope, Senior Director of Distribution and Process called on Carson Tate of Working Simply.

### **SOLUTION: WORKING SMARTER, NOT HARDER**

Tate, the founder and president of Working Simply, studied the situation at CCBCC to see how the OPSRs operated, how their managers could help them, and how to handle the administrative work. She adapted her *Work Smarter, Not Harder* (WSNH) program to meet CCBCC's needs. As a result of her training, coaching and reinforcement program, CCBCC was able to restructure and reignite their organization, reduce the chaos, and increase OPSR productivity.

Instead of simply applying a generic set of principles to CCBCC's unique problems, Tate consulted with CCBCC and customized a solution that targeted their specific business objectives. For clients like CCBCC, Working Simply provided a comprehensive suite of programs to train team members on three critical skill sets: how to invest time wisely, how to handle information overload and how to get work done.

"We never just apply our solution to every problem," said Tate, "Each client is different and we need to hear what their problems truly are before building the solution. Instituting behavior change involves just as much listening as talking." Together, Tate and CCBCC staff identified severe pain points in the OPSR day that hurt their efficiency.

## *Achieving Strategic Objectives Through Goal Clarity & Alignment:*

Working Simply can enable your business to gain a competitive advantage and be more profitable, streamlined and efficient by helping you harness the power of productivity.

Working Simply's *Work Smarter, Not Harder* program emphasizes three keys to success:

- Invest your time wisely
- Handle information overload
- Get your work done

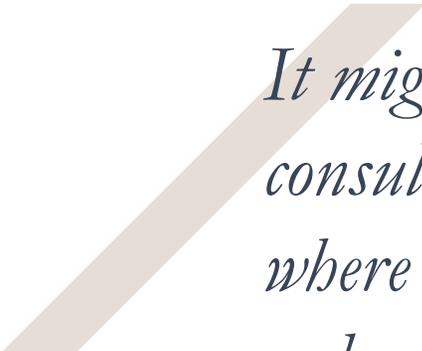
Tanner Ace, District Sales Manager with CCBCC, appreciated that the *Work Smarter, Not Harder* program was not a cookie cutter solution. “You take the template that your facilitator gives you and as a team you start bouncing ideas off each other and you start to develop your own plan, versus someone saying ‘Here. This is what you do, step one through ten.’”

### **ANOTHER DAY WITH WORKING SIMPLY: GOALS, EMAIL PROGRAMS, AND CAR TRUNKS**

Along with the CCBCC team, Tate drew up a plan to help each OPSR save time and be more effective.

“There were numerous opportunities for improvement. We decided to focus on three concrete skill sets that would yield the highest return for each OPSR’s time investment. We focused on how to align execution to organizational goals, how to more effectively and efficiently manage email and how to efficiently organize the OPSRs’ cars.”

**Wait...their cars? Really?**



*It might be surprising to think that a consultant would spend time talking about where in the car a salesperson keeps their order forms, but Working Simply is not a conventional consultant.*

Working Simply targets problems and designs solutions. If the sales person’s stack of papers in their front seat is a problem, a Working Simply engagement is going to have a look at how to improve the situation. “Their cars are an extension of their office,” Tate said, “We couldn’t just talk about getting organized. The OPSRs needed help getting their mobile offices in order. Digging through their back seat for the right form or file took real time.”

That time added up and meant the OPSRs were working longer hours than they needed to.

## FOCUSING ON GOALS, NOT TASKS

The custom courseware Working Simply built for CCBCC was built around end results. As it happens, CCBCC already had those goals in place. Each OPSR already had reward-based compensation targets in place. The training helped them to choose actions that would best support their compensation goals.

Tate used the Working Simply approach to align OPSR monthly, weekly, and daily tasks with these goals. "The OPSRs were already equipped with goals to aim for. My job was to get them there. We can be more effective when these discussions are based on goals that are already in place."

In the in-person training, OPSRs talked through scenarios that evaluated their best use of time.

## EMAIL CLARITY - FINALLY!

Like millions of American workers, the OPSRs spend significant amounts of their workday using Microsoft Outlook® to manage email communications, schedule their time, and find information. However, few of them had spent much time thinking about how they could be more efficient in using this important tool.

The participants learned how The Working Simply Email Agility Circle™ keeps their inbox clean, their calendar up to date, and tasks prioritized while taking significantly less time. Tate showed the attendees how to use advanced Outlook features to turn messages into tasks and make their calendar accurately reflect their workday.

OPSRs reported immediate results that saved them hours a week.

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*"I am saving 2-3 hours of work I used to do at home each night."*

— CCBCC OPSR

## WORK SMART IN COMMON TASKS

Experts, including noted author and entrepreneur Seth Godin, agree that getting help improving the time you spend with your email and productivity tools is well worth it.

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*"Whatever you need to pay for this service, it will pay for itself in a week."*

— Seth Godin

## WHAT IS BEHAVIOR CHANGE AND HOW DO WE GET IT?

Initially, Tate assembled a half-day in-person training to introduce the OPSRs to techniques that could alleviate their stress level. She specified objectives built around their goals.

However, training and organizational development experts agree that instituting behavior change is difficult; it takes more than a PowerPoint® deck and a binder.

If you ask training experts, they all recognize how difficult behavior change can be. “Designing training for behavior change takes more than a single contact with the idea,” said Jeannie Sullivan, training and coaching consultant of Insight Learning Studio, “To really make a difference in an organization, we have to integrate the new process with the organizational culture. The learners have to be a part of their own change.”

## REINFORCEMENT: IPADS, MANAGERS AND PEER GROUPS

Working Simply's customized approach used four key contact points to help the OPSRs apply what they learned in the initial training session: personal action plans, managers, monthly peer coaching groups, and an innovative iPad application that gave OPSRs instant access to their *Work Smarter, Not Harder* courses.

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*“I am getting more done. I make more sales calls each day, I am feeling more organized and I am less stressed.”*

— CCBCC OPSR

# *Working Smarter, Not Harder: CCBCC Objectives*

- Prioritize your time to positively impact the revenue line
- Quickly process, sort and execute items on your to-do list
- Apply time management concepts such as “time-blocking” to avoid wasting time
- Leverage technology to streamline calendar, task and email management

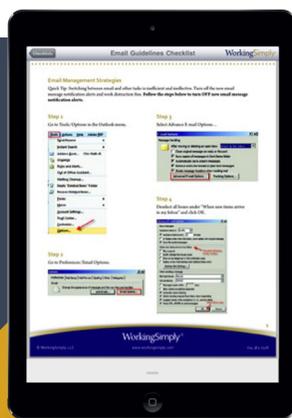
“At the end of the initial training, each OPSR created an action plan for the next 120 days, which they shared with their manager,” said Tate. The se action plans involved personalized, concrete organizational, scheduling, and prioritization next action steps. Managers regularly checked in with the OPSR to learn how well they were doing with their action plan.

CCBCC is an organization that takes training seriously. They have an inhouse training staff that continues to build and present training for the entire organization. By creating a train-the-trainer course, Working Simply enlisted four in-house CCBCC trainers to follow up with the OPSRs and to integrate the *Work Smarter, Not Harder* into their existing sales training program.

### WORKING SIMPLY IPAD APP: THERE WHEN YOU NEED IT

During her initial consultations with CCBCC, Carson Tate became aware that all OPSRs were already issued an Apple® iPad® that they used for communications. She recognized that this was a great tool for reinforcing the OPSRs’ behavior change.

“We organized all of the content from the training and created easily accessible modules. Then, we packaged it all in a custom app,” explained Tate. When an OPSR needed to learn one of the Outlook techniques, they could watch a short how-to video. If they had a frustrating day when they weren’t prepared for their calls, they could review their revenue targets and territory planning strategies. OPSRs really appreciated and heavily utilized the new resources loaded on their iPads.



#### Working Simply App

CCBCC Sales Representatives could refresh their knowledge of their new program any time through videos and tutorials on their iPads.

*“My stress level has decreased dramatically. I feel like I am getting everything done during the day and can end my day without anything hanging over my head.”*

— CCBCC OPSR

## PEER GROUPS WITH A TWIST

Tate knew from her experience that these behavior changes needed to become a part of CCBCC culture. The program had earned the buy-in of both management and the OPSRs, but the team members needed further reinforcement – and the best reinforcement comes from within. As such, Working Simply organized peer groups that met on monthly conference calls to review their efforts. Instead of having these peer coaching groups based on existing sales territories, each peer coaching group was intentionally organized so that OPSRs who did not normally work together could consult and cross-pollinate.

Tanner Ace was impressed with how helpful the peer groups were. “Once you get in there and really start interacting with each other, you will really be surprised at how you can help each other out,” he said.

## THE OUTCOME: SO – WHAT IS THE ROI?

CCBCC invested a great deal of energy and the valuable time of their front line sales people in the *Work Smarter, Not Harder* program. Before they started, they noted two things they wanted to improve:

- The productivity of their OPSRs, in particular their ability to make their sales call quotas while still fulfilling their other commitments.
- The quality of life for those important sales people. Even dedicated people need time off and to be able to make their kid’s little league games.

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*My team is averaging over 48 calls per week and I am no longer getting emails at all hours of the night.”*

— CCBCC OPSR

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On both fronts, success was easy to gauge. CCBCC had set a goal for every onpremise sales representative to make 48 calls per week. Before CCBCC adopted the *Work Smarter, Not Harder* program, it was rare for any team to make that goal. Now, almost every OPSR makes their quota. Every week.

## INCREASED REVENUE AND STILL HOME FOR DINNER

Chris Pope, Senior Director of Distribution and Process, put the improvement into dollars and cents, “By being better organized and having a more defined daily plan, reps are able to make more sales calls per day. As a result, our total sales calls per week are up over 20% from the prior year. These additional calls per week should easily translate into \$2 million in additional revenue per year.”

One sales manager noted,

*“My entire team has improved their sales numbers. As for quality of life, the OPSRs themselves are grateful for the way the Work Smarter, Not Harder program has made them more efficient.”*

Said one OPSR, “My stress level has decreased dramatically. I feel like I am getting everything done during the day and can end my day without anything hanging over my head.”

Another said simply, “I can breathe now.”

CCBCC is not done with Carson Tate and Working Simply. They see these results and plan to continue to take advantage of the program Working Simply has built for them.

“Given these great results and the positive feedback from our team, we are now rolling this program out to our front-line managers across our entire company,” said Pope.

## *About Working Simply*

Our partnership with you has one explicit goal—to help you build a winning workforce in which your people leverage their productivity strengths to work simply each and every day.

We offer customized solutions designed for your enterprise to boost productivity, accelerate performance and develop high performance teams. And we support you with technology, training, coaching and consulting to build a culture that works simply.

Working Simply delivers the personalized service of a boutique firm, scaled to some of the largest and most respected organizations in the world including AbbVie, Deloitte, Wells Fargo and United Technologies.

### **ABOUT COCA-COLA BOTTLING CO. CONSOLIDATED**

CCBCC ([www.cokeconsolidated.com](http://www.cokeconsolidated.com)) produces, markets and distributes carbonated and noncarbonated beverages, primarily products of The Coca-Cola Company, which include some of the most recognized and popular beverage brands in the world. CCBCC is currently the largest independent bottler of products of The Coca-Cola Company in the United States, operating in eleven states, primarily in the southeast. CCBCC also distributes several other beverage brands.

# Yes, we can help you build a winning workforce

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