



# Robusta

The coffee business isn't all Arabica beans.

A sales, marketing and leadership story

by Troy Forrest

Principal, 42 **MIGHTY**



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## A note from the grinder...

Thank you for choosing to sip from this quirky brew of sales, marketing and leadership practices, delivered with a smile via 90 connected 1-page story shots.

*Robusta* is designed to entertain, provoke thought and maybe even inspire better business practices. A work of fiction, any resemblance to real people, products or businesses is entirely coincidental. Unless you think it's flattering, in which case you can pretend we're talking about you.

I hope you find something in each page to make it worth your time, money and effort investment. Moreover, I hope you choose to act on the pointy reminders you come across. Ones that slap you upside the head. Ones you know to be true.

Have a great day, and don't forget to stop and smell the Espresso!

Troy Forrest

Principal, 42 **MIGHTY**

[troy@42mighty.com.au](mailto:troy@42mighty.com.au)

[www.42mighty.com.au](http://www.42mighty.com.au)

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## #1 - Expensive

"Phwww... expensive!"

Chris got this a lot. Before him stood Marco the coffee shop owner, shaking his well-groomed 40-something head. Chris had just run Marco through the features, benefits and pricing of the flash new Carlton Coffee Machine ("Robusta Grande" model). While still pretty green in this rep role, the price objection was one Chris had struggled with his entire sales career. Chris held his tongue and waited for Marco to say more. Marco looked at the Carlton glossy, scrunched his nose, grabbed his calculator off the counter and punched some buttons.

"42 cups!" said Marco.

"Sorry?" said Chris, raising his eyebrows.

"42 cups. That's how many extra cups of coffee I'd have to sell each day to cover the cost of this new machine. You want me to trade in my old machine, which is old but fine, and buy this new one... I have to be able to sell 42 more cups of coffee each day just to break even."

Chris had no idea how Marco calculated the number. Nor, truth be told, did he know how upgrading machines would help Marco sell 42 more cups each day.

"Well...", Chris stammered, about to rehash the shiniest bits of his sales presentation.

"I need to think about this, Chris. I like the look of the new machine - it's sexy and would make the place look great. But will it make me more money? I'm a small businessman, Chris - that's what I'm interested in."

Chris nodded. No sale here today - a donut in the CRM. Something to pick Simone's brain about when they next spoke. How does our slick technology make these kinds of clients more money? As the epiphany cogs started turning, a waft of fresh ground beans stole Chris's attention away...

## #2 - Juggling

"We have to hit this number - get them fired up and implementing the promotional strategy" read the email.

Simone, National Sales Manager for Carlton Coffee Machines, pursed her lips and puffed her cheeks like a Blowfish. The note, cc'd to the National Marketing Manager, was from the MD Kevin, and the undercurrent wasn't veiled - the team must perform or cuts are coming.

With an MBA from Macquarie, an office full of sales awards and approaching two years in her job running a team of 8 reps across Australia & NZ, Simone had the credentials to get the number up. She understood her P&L responsibilities and had learnt to negotiate the never-ending procession of management-level meetings. Simone prioritised time with her team, helped them set SMART goals and develop territory plans, even co-travelled with them twice as much as her predecessors ("You can't lead them if you don't spend time with them", Simone forever told her partner). She knew where each rep sat on the Boston Matrix of 'competence' and 'commitment', and she nurtured a culture of continuous learning by booking the team in for lots of training (most recently, DISC).

Simone looked out her second floor office window and watched the freight truck reverse up to the loading bay, beeping and belching exhaust fumes. Long term reputations, she'd spruiked to her team. Think about our mission statement - "Responsive, ethical and invested business partners..." and make daily choices consistent with this standard. Just when Simone thought she'd got the message through - that we don't want customers seeing us as short-sighted, money-grabbing dodgy brothers - the global number had taken a nosedive and the hierarchy started breathing fire. The message from above - this is no time for progressive approaches. Get a stick and flog 'em to hit this quarter's number. We need cashflow. Go hard.

A juggling act, Simone told herself. Tectonic plates that shift just when you're getting comfortable.

She released the air from her cheeks with a slow blow and picked up the phone.

### #3 - Savvy

Marco tamped ground beans into the filter handle and watched Chris walk out into the morning sunshine. He's a reasonable young guy, thought Marco. Lazy, not done any homework, but nice enough.

Marco flicked the switch to start the pour. He'd decided a month ago he'd get a new machine. "Puffing Billy" had served valiantly, but was now unreliable and costing money in downtime, spare parts, and the ongoing maintenance contract put under his nose two weeks ago would cost him more than the machine was worth. Marco was midway through planning a cosmetic overhaul of the shop to capture more of the lunchtime crowd that frequented the nearby food court, and compared to the capital works, the coffee machine Chris had shown him was peanuts. That didn't mean Marco didn't want the sharpest pencil on the quote he could get. Nor did he mind putting his suppliers to the test.

"Sugar, Sir?" Marco asked the cardigan wearing senior citizen standing at the register.

"No thank you. Just fine like that."

"Thank you Sir. I hope you enjoy it." Marco smiled and passed the coffee across the counter.

"Now, have I ever told you why I like coming in here?" the old man asked Marco.

"No Sir, but we are very grateful! Why do you like it here so much?"

The man took his coffee. "Well, it's not too loud - the food court down the road, it's very noisy, you can't have a coffee in peace. Always very friendly, your staff. Always call me Sir - you don't get that much anymore. And you make a very nice cup of coffee too!"

Marco smiled and thanked the gentleman. It's not hard, he thought, but seemingly it is. Sell good coffee, quickly, with a smile, look after regulars, focus on comfort and getting every interaction right, and you've got a platform.

He hoped Chris got his act together. He liked that machine. Two more customers walked through the door.

## #4 - Vent

Rory ("The Racing Car" to the sales team) felt his Blackberry vibrate and looked at the screen. Simone, The Carlton Coffee Machines National Marketing Manager quietly snuck out of the plenary session and stepped into the foyer. He answered Simone's call to hear her ask if he'd seen Kevin's email.

"Yes, about an hour ago. Global's pushing him hard. US number will fall 28% short of target and we've been asked to cover a chunk of the shortfall. He's looking stressed."

"It's bullshit. They've already increased the number twice, and I've got a team griping about how unfair it is to constantly change the rules. Two are ready to jump. I think one will. Don't you think it's crap?!" Simone vented to Rory, not bothering to use the same diplomatic can-do communication skills that earned her so much sales success. Her bluntness put many leadership peers offside.

Rory massaged the conversation. "I know. The upside, it's a great opportunity for the salespeople that want to stand out. We're giving them some kick-arse promotions that are well priced. If they all took a leaf from Catherine's book and follow their key account plans, there's no reason they can't be raking in fat commission cheques in January. It's just discipline."

"Yes, well, that's great for Catherine, but I'm not sure all in the team have her capacity. Most don't even like her. Where are you anyway?"

"Singapore. The APCE. Home tomorrow. Just sat through two presentations, funny contrast. One lady, from a family coffee business, was a bit rough, but all about passion and energy and she had a simple message. The other guy was some retailing guru, you could tell he knew his stuff, but sooooo boring. Jammed too much content in. Half the room's checking their phones."

"Well, when you get back, can I get you to send your 3 out in the field with the guys, particularly Chris, and Jamie in Perth could use a hand. We need to help them spark this ASAP."

Rory sat on the fence. "I'll check with the team, but you have to appreciate, they're very busy getting stock in - we have to have something for them to sell." Bossy bitch. Who died and made sales King?

## #5 - Ninja

There are sales try-hards. Cruisers. Think-they-know-bests. Gunnas. And then there are the disciplined doers.

Catherine was a disciplined doer. Two-time Sales Rep of the Year for Carlton Coffee Machines, only maternity leave had prevented a three-peat, and it still rankled her (they could've paid it pro-rata, she thought).

On a sunny Brisbane day, Catherine drove her well-maintained late model Commodore to her next appointment - a law firm on the CBD fringe in need of a high-end coffee machine. She knew this was to help their flush clients feel important, and money was no real object (it's amazing what people will volunteer with a few smiling, interested questions, Catherine thought). She'd just finished a sales call at a busy city hotel. It had been textbook. From the pre-call planning and Google research, to the warm small talk with the manager and the well considered questions she asked, to showing them the post-purchase productivity increases and relevant benefits they'd enjoy, right through to asking permission to set up a demo and confirming the next steps, finally taking 60 seconds in the car to plug notes into the CRM. Even with the cheap Carlton pen leave-behind, Catherine somehow made people feel like they were getting a 24-carat gold watch. Catherine could sell.

Her mobile phone jingled in its cradle. Chris. Catherine let it go to message bank. Not now, Chriso, she thought, I need to get my head ready for this next meeting. Prioritising who got her attention at any moment was a skill Catherine had perfected over her sales career. "There's only one of me, and I can only focus on one thing at a time. What one thing will have the greatest impact on me achieving my goals?" Catherine would return Chris' call after 3, when she'd diarised time to follow-up all non-critical messages.

Catherine pulled her car into the undercroft carpark of the law firm. Lawyers. I like their model, Catherine thought. Bill in 6 minute increments. I break my sales target down into days and sales conversations. Maybe I can shrink it to 6 minute blocks? Catherine's brain did the math as she grabbed her compendium and started to review her call plan.



## #6 - Baggage

Chris heard Catherine's voicemail kick in and hung up before the beep. Can't get anyone today. Simone's phone was engaged and his usual crappy-sales-call debrief partner Mark was on leave.

Chris sat in his car outside Marco's coffee shop. Why are customers so price conscious? Why do I get the hard ones? It used to be easier - maybe I'll go back to selling on the shop floor. Catherine makes it look easy - that's because she's got the better territory. Less price-sensitive customers, Chris thought. His normally happy self got dark after bad calls.

Chris looked out his rear view mirror and noticed a small cafe across the road. May as well have a crack - I'm here, aren't I? No other appointments, can't get worse. He looked at the closed laptop on the passenger seat. Call notes can wait. Prospecting comes first, right? Sure I'll remember the important bits.

Chris went to the boot and plucked a Carlton Coffee Machines brochure from the mess. Simone rode him about his boot organisation last time they'd co-travelled, and he'd promised to get it sorted. This weekend, he said three weeks ago.

Halfway across the road, Chris remembered he'd run out of business cards. He started to backtrack, then changed his mind. No, a good opportunity to go back tomorrow, he thought. I'll leave the brochure today, pretend I'm out of cards and go back with one tomorrow. Double the calls, double the chance, right? Chris smiled at his cleverness as he pushed open the cafe door and headed straight to the counter where a young girl was pouring a can of lemonade into a glass. What's the name of this place again? No mind.

The girl looked up at Chris and, seeing his not-quite-tied tie, partially untucked Carlton-branded shirt and brochure in hand, formed a lasting first impression.

## #7 - Interested

Carlton Coffee Machines Marketing Manager Rory said goodbye to Simone and hung up the phone. He was standing in the lobby of a 5-star Singapore Hotel. Around him were a smattering of trade display booths. The APCE - Asia Pacific Coffee Expo - wasn't the region's biggest coffee convention, but it looked after the trade, had the right delegate demographic for Carlton, and so they'd been consistent supporters since its inception ten years ago.

"Rory!"

A short bespectacled man in a smart suit waved from a nearby booth. Rory walked across.

"Hey Frank, how are you?"

"Ah, no point complaining, no one listens anyway! Having a pretty good conference so far. We're getting nice feedback on the new espresso beans, some interest from a couple of big guys. How about you - are you getting your money's worth here?" Frank was a likeable well-manicured gent who owned a small roasting house out of Melbourne. While technically a competitor, Rory and Frank often spoke at trade shows. Beans were a small adjunct distribution line for Carlton, and Rory often considered the merits of bringing Frank in as their bean supplier when the current contract expired. Everyone's a potential partner, though Rory.

"Not bad. Bit of flag flying, always on the lookout for good new suppliers, Frank. We're showing off the new machine, the *Robusta Grande*. I think the team are getting some interest."

Rory looked across to the Carlton stand - a pricey double-size display to accommodate their on-stand coffee shop. Sitting near the machine on a stool was Kenneth, their Singapore Sales Rep, reading a paper. Standing off to one side of the booth was Siddarth, Carlton's Malaysian distributor, texting on his Blackberry. Got to teach these guys some trade display etiquette, thought Rory. They've got to look interested. Present. Not predatory, but attentive.

"Good, good. Well, we might catch up for a drink tonight then!" said Frank, and he quickly excused himself to apply his warm smile to a trade show delegate who was perusing Frank's beans brochure on the fringe of the booth.

"Good morning Sir! Are you having a good conference?"

## #8 - Anticipation

"Now, you mentioned you need a reliable, easy-to-use coffee machine for your clients to enjoy," said Catherine.

As a bridge from niceties to business at hand, every word in Catherine's sentence had been pre-considered. "Now" (to the point, showing I'm conscious of your valuable time), "you" (the most important person in the room) "mentioned" (I remembered) "you" (the VIP) "need" (not just want, *need*)... sentence-level pre-call planning. Always finish on a high. "Enjoy" - coffee and partnering with me should be fun, thought Catherine.

"Yes, our clients expect silver service, and we want to offer everyone that comes in a beautiful coffee, their favourite coffee" said Belinda, the law firm's Business Development Manager.

"OK" said Catherine, "will your clients be making their own coffee, or will one of your team do it for them?"

"One of our team will make it - we have a front desk team of 3. They're already used to making clients coffee, but not from a machine."

"That's VIP service you don't get much anymore. We're seeing customer self-service becoming so common. I think it's brilliant" said Catherine, meaning it.

"We want our clients to feel like they're the most important people in our world" said Belinda.

Catherine nodded and agreed with Belinda's philosophy. She asked Belinda a few more logistical questions about client numbers, average waiting times and potential for staff utilisation of the machine. Catherine also asked if Belinda had seen any machines that had caught her eye.

"Oh, I looked in Harvey Norman the other day. I wasn't sure what to go for. That's why I called you."

"I understand - there's a lot of machines out there, most of them great for the applications they were designed for. Based on what you've told me, what I think will meet your needs is a small to medium size machine, easy to use and maintain, fast, and can cope with making up to 4 cups at once for small groups of your clients. Something that's easy for your team to master, keep clean and will cope with your busy practice. And you'd like it kept maintained, full of beans and, should anything ever go wrong, you'd want someone here immediately to fix it - does that sound right?"

Belinda nodded. "Exactly."

I love sales, thought Catherine.

## #9 - Education

In the global headquarters of Carlton Coffee Machines, National Sales Manager Simone's high heels click-clacked down the tiled corridor between her office and the training room. She passed a wall papered with glam photos of bustling cafes, steaming machines and enticing coffees, and opened the training room door.

"Hello!" said Simone to the group of 15 casually dressed men and women sitting on stools around chemistry-lab-style benches. A friendly murmur came back to her. A man working at the front of the room readying a coffee machine stopped what he was doing and greeted Simone before turning to the group.

"Guys, this is Simone - I'll let her introduce herself." said Kostya.

"Thanks Kostya. Ladies and Gentlemen, I'm the National Sales Manager for Carlton Coffee Machines, and on behalf of the company, I want to welcome you here to our Barista School. I want to thank you for choosing a Carlton Coffee Machine for your franchise. I know you won't be disappointed."

Barista School was an innovation Simone had championed. After a number of strategic planning meetings with the leadership team and select salespeople, Simone decided that if they couldn't beat cheaper imports on price or distribution channels, then they'd value-add and differentiate via the best training and after-sales support in the local market. Every commercial coffee machine client in Australia was offered a free place in the 3-hour Barista School program, run out of their state-of-the-art Adelaide headquarters, at select TAFE colleges around the country, or even out of the back of a Carlton van for remote clients.

"Kostya, who you've all met, is our resident coffee machine guru - our "Barista-in-residence" - and he'll be taking you through the paces, showing you how to get the most from your Carlton machines, how to maintain them for peak performance, and how to make amazing coffees with them! We're very proud of this training program, and we believe in investing in our partnership with small business people like yourselves. We want your businesses to thrive, and we want Carlton to be a part of your ongoing success. I hope you enjoy the workshop, and I'll leave you in Kostya's capable hands!" Lots of smiling nods, and giving Kostya a "That should kick it off nicely" look, Simone turned and left the room.

Wish that make-em-feel-loved stump speech was enough to turn this number around, thought Simone.

## #10 - #epicfail

"Hello! Is the manager in today?" Chris asked the young girl behind the counter. Her hackles rose.

"Um, no. Can I help you?"

"Ahh, can I ask when he'll be in?"

"The manager is a she." Patiently, "Are you selling something?"

"Oh, my apologies!" Chris realised that in 3 seconds flat, he'd dug himself a hole. Time for the charm, Chris. "My name's Chris, I'm from Carlton Coffee Machines. I'm sorry, I didn't catch your name?"

"Melanie." Like it said on her nametag. The door of the cafe opened and a businessman talking on his mobile walked in and stood behind Chris at the counter.

"Ah, Melanie, I'm here because we sell a range of high quality coffee machines, as well as coffee beans and a range of consumable products for coffee shops. Have you heard of Carlton machines?"

"No. Did you want to leave a brochure for me to pass onto the manager?" The man on the phone, half listening to the conversation, picked up the tone in the young girl's voice. Chris didn't.

"Sure! I'll leave this brochure to tell you a bit about our products. Can I ask, how old is your machine there?", pointing to the silent 4-cup unit.

"Uh, it's brand new. We only opened a week ago. Can I take the brochure and leave it for the manager?" Her patience facade slipped away.

"Sure! Look, I've run out of business cards, so I'll pop back tomorrow to drop one off and meet the manager - do you know what time she'll be in?" The man behind Chris had hung up his phone and was studying the chalkboard menu.

"I'm not sure. Perhaps phone ahead. I'm sorry, I have to serve now. Thanks." The girl took the lemonade she'd been pouring and walked it over to a table where a mother and her toddler were reading a storybook. Chris offered his thanks to the girl's back, left the brochure on the counter and turned to walk out. He realised that, apart from the waiting man and the mother and child, the coffee shop was empty and still had a new furniture smell. Opening the door and stepping into the sunshine, Chris' disposition took another nosedive.

Didn't even find out the manager's name, did I?

## #11 - Supportive

"Guys, it's not a great look on the trade display, being on the phone or reading the paper." Rory, Carlton Coffee Machine's National Marketing Manager, was speaking to Siddarth and Kenneth, Carlton's Malaysian and Singaporean representatives.

"Oh, sorry. I was just texting a client back, confirming an appointment" said Siddarth.

"Mate, no problems, just best to do it away from where clients can see you."

Kenneth held up what Rory first thought was a newspaper, only to see it was an industry publication. "I'm just reading about the new Falgiorno machine. 22 programmable buttons, a new attached milk fridge, fastest pour of any machine they've ever made." Kenneth had a passion for staying up to speed on technology and industry happenings.

"My apologies Kenneth, I thought you were reading the paper. Yeah, it's going to cause us some challenges. Their pricing is pretty sharp too" said Rory. His phone vibrated in his pocket. "scuse me guys", and he stepped out of sight behind the trade booth.

"Hi Jack, how's it going?" Jack was Rory's product manager for commercial machines.

"Great. I've just had a good phone hook-up with Mickey, who tells me they're now through the back orders and delivery's next day again. I've thanked him and sent a nice note to him and his boss. They worked hard to manage that."

"That's fantastic. Really good job staying on that, Jack. With this new promotion, we hope that orders start coming through thick and fast. The fact we're not starting behind the 8-ball with a backlog is brilliant. Your driving this has made a difference - thank you." Rory had a leadership trait his team loved - he was exceptionally supportive of his people and free with praise and encouragement.

"Ah, cheers Rory, appreciate that. Still plenty to do with the advertising, but a good win."

"Now mate, the sales team are going to need all the help we can give them in the next few weeks. Can you check your diary and see if we can get you to Perth for a day next week?"

You catch more flies with honey, his Dad used to say.

## #12 - Translation

A steam cloud hung momentarily between Kostya and the coffee van franchisees seated around the benches.

"Then, all you do is wipe the milk spout, and you're done, ey?" Kostya's parents were Croatian, but he'd spent his formative years working in Auckland coffee shops, and the accent stuck.

"So what happens if the coffee sounds like it's grinding, but nothing comes out? That happened a fair bit at a place I used to work." The question came from a thin woman in her late 20's or early 30's. She was one of fifteen new business owners at this sitting of Carlton Coffee Machine's Barista School. Kostya had been demonstrating the correct operation of the *Piccolo Netto* machine, specifically designed for coffee vans. The master franchisor these trainees had invested with was called *Wakeup & Inhale*. Their USP was their coffee vans - funky modified Holden Sandmans.

"Yeah, really good question, and we saw it a fair bit with older machines, less now. It can be one of 3 things. First thing to do is check your machine hasn't filled with scale, ey? See this little red indicator? If it's glowing, you just need to pop one of these little tablets in here - can you all see that?" Nodding. "Yeah, you then press this button to run through a cleaning cycle and you'll decalcify the machine. That'll generally fix it, oh, 8 out of 10 times? The second thing it might be is a little stone that got mixed in with your beans. Usually when this happens, you hear an awful grinding noise, and you need to turn it off and check. If there's no obvious stone or foreign body, your best bet is to call our techies - our number is right on the side of the machine here, see? They're really good, they'll either fix it on the phone with you, or they'll jump straight in a bus and get to where you are, ey? From memory, you guys bought the full service package?" More nodding.

"Yeah, that's the go, makes your life easier. The third thing it might be is the grinding blade has come loose. Really uncommon, but never say never. Again, that's a job for the techies - don't stick your fingers in there, particularly when it's turned on. So, three things - try the decalcify cycle, check there's no stone, and if that's no joy, jump straight on the phone and use our techies, they're really fast, and they'll get your flash vans operating again quick smart."

To the lady who'd asked, "Does that answer your question?"

Not only could Kostya make a cracking cup of coffee, the simple clarity he brought to explanations gave purchasers confidence that they too could master the technology quickly.

"Why don't you come up and have a go, Sonia, isn't it?"

Sonia nodded and stepped forward.

## #13 - Planning

Catherine stepped into her home office and turned on her laptop. 5:14pm. Her husband Kyle would be home with the kids in about 15 minutes. Just the right amount of time.

Catherine reviewed her run sheet for the day gone and marked off all the activities she'd completed, diarised follow-up tasks, started tomorrow's sheet and made a list of follow-up emails she'd need to send out before leaving the house tomorrow. Catherine was religious with her 24-hour follow-up rule. It nipped post-purchase remorse in the bud and reminded clients just who they were partnering with. Only one call left to be made today. Catherine dialled Simone's number.

"Hi Cat! How was your day?" asked Simone, not giving away her mood in her tone.

"Hi Sim - really good thanks. You'll see the order for the lawyers on the system shortly, margin's great. Their clients are the top end of town, so I think we'll get some great advertising from this one machine."

"Oh, great work! Did you get their consumables business too?"

"Yes, 6 month contract to start, we've diarised a review meeting then. I've also made an appointment to speak to a big accounting practice in the same building they referred me to. Keep you posted. Hey, quick one, I know you're coming up in 2 weeks, and you know Keith Jones from the Casino. I'd love an introduction, I'm trying to get in with their Food and Beverage manager, and they're being elusive. Would you mind if we scheduled an appointment for us both to go say hi?" If my boss is connected, why wouldn't I use it, thought Catherine.

"Sure. I'll make the call tomorrow. Wednesday anytime?"

"Well, we're booked to review the business plan and do my performance appraisal at 8, then we're at the tender briefing at 3, so anytime between 11 and 2 would be great. Thanks Sim, I've got to keep moving, I'll confirm our schedule on email and speak to you tomorrow about the tender process - we've got to get our contacts made before the document gets released."

Catherine and Simone said goodbye to one another and hung up. Closing the book on her professional day, Catherine walked to the kitchen to start tea. She heard her husband's car pull into the driveway.



## #14 - Hyperopia

Kevin interlaced his fingers behind his head and stared at the darkened ceiling above his bed. If they carved off the remainder of their manufacturing arm - the place where the Carlton Coffee Machines empire all began - could they hit the 5-year profit target the board was asking for? The question had left him studying his ceiling at 3am for weeks.

Kevin ran Carlton Coffee Machine's Australian operation. 42 years ago, Carlton was born in a small shed in suburban Adelaide. Today it was a \$220 million dollar manufacturing, sales and service business with a presence in over 20 countries. Carlton's founder Gino, an electrician with vision and unstoppable energy, named the business after the Melbourne suburb he grew up in (more correctly, its famous football team). Through grit and the network of friends and family Gino recruited, Carlton machines found their way into cafes, restaurants and hotels around Australia before distribution channels were opened for global penetration. The business grew in scale and sophistication, Kevin being the third MD since Gino's departure 17 years ago.

To stay competitive in a growing but increasingly savvy market, Kevin directed the business to outsource the bulk of its manufacturing to Indian and Chinese factories that could produce Carlton-specified products cheaper, faster and on a larger scale. It allowed Kevin to focus his team's efforts on sales, service and distribution competencies. A business devoted to customer partnerships and growing wallet share; less dealing with widget-making worries. The move had brought better profit returns for several years. But the current outsourcing efficiencies were no longer enough. The board was exerting pressure to cut more costs to cover the projected sales losses their US operation would incur for the foreseeable future. On the table for Kevin's leadership thinking - cull the remaining manufacturing operations and becoming a pure sales and distribution company.

Making machines made us, thought Kevin. It's our heritage. It's why many customers are loyal to us. Close the plant, and we'll lose people, good people. But if we don't rationalise, don't change before we have to, then we'll start haemorrhaging cash. That's more job losses and a shakier long term business future. Not to mention the impact on takeover prospects. There are alternatives. Kevin tumbled them over in his mind, counterbalancing his values with economic rationalism. He tried to think and look and anticipate further and further ahead.

The little voice in his head spoke up. Remember when you were a sales rep, Kevin, and all you had to worry about was yourself and your number?

Kevin sighed. He knew the ceiling above his bed intimately.

## #15 - Solid

It was 6:15am and Simone was sitting at her study desk looking at the previous days orders on her laptop. Catherine's order from the lawyers was on the system, now waiting to be filled. A smattering of consumable orders from around the country, no other big machines yesterday. Chris, for the seventh day in a row, scored a donut. Not even a regular order of a bag of beans. He's going to have to go, thought Simone. She took a sip from her coffee. Mmm.

The Robusta bean, or *Coffea canephora*, makes up 20% of the world's coffee crop. Originally from Ethiopia and now grown primarily in Vietnam, Brazil and Central Africa, the canephora plant has a robust shrub shape and shallow roots. It's not as refined or popular as its more famous cousin *Arabica*, universally considered to be a better tasting coffee. But it's more hardy, requires less pesticide and herbicide, has a greater crop yield, and contains more caffeine in every bean.

I need a few Arabica-style sales reps, thought Simone. Refined, polished performers. Pride of the Carlton name, brand ambassadors. Catherine types.

But I'd also be happy with a backbone team of Robusta's. Solid. Dependable. Won't set the world on fire, but resilient, gritty, having a go. And while imperfect sales skills might mean sacrificing some margin here and there, at least the higher yield that comes with high activity would keep the cash wolves at bay.

Simone considered the meeting she'd be having with Kevin, Carton's MD, later that morning. She wondered about the merits of sending a razz-em-up email to the troops. She thought about the phone link-up her team would be having on Monday, and how she could impress and support and inspire them to climb the sales mountain with the new promotion. She mused over what to do with Chris - maybe there was something she could try. And she played with the idea of a gala VIP client event she and Rory had been discussing, something the industry had never seen before.

Big day. Big job. Simone took another sip of her coffee. I'm up for it.

## #16 - Appoint

"It's a new dawn... it's a new day... it's a new liiifffee..for me... and I'm feelin'....gooooood." Michael Buble warbled on Chris' car radio. Yes, a fresh copy book page today, Chriso. His phone started vibrating in the cradle and Mancini's *Baby Elephant Walk* over-rode the smooth crooner.

"Hello, this is Chris."

"Hello Chris, my name's Collette. I've been given your name by a friend. I've just taken over a coffee shop in the city, Manni's."

Chris' ears went all ninja. He imagined himself as a white pointer shark, sniffing out a single drop of blood in the water.

"Oh yes, I know it. A great spot!"

"Yes, well, it needs a lot of work. The reason for my call is we need a new coffee machine. My friend, who runs another coffee shop, suggested I speak to you. He said you'd look after me."

"Sure, sure! Who's your friend, can I ask?"

"Marco. Can you do me a good deal on a new machine?"

"Uh, yeah, I'm sure we can help." Think, think, Chriso. "Um,... do you know what size machine you're after."

"Just something to replace the old one, it's breaking down all the time, and they can't get the parts anymore."

"Oh, OK. Well, the best thing to do might be for me to come in and show you a couple of options...." Somewhere from the recesses of Chris' grey matter, a sales training course he attended years ago came flashing back. "If you like, we can have a quick look at your space, how many coffee's you're averaging a day, and that way I can give you the best pricing on the machine that'll best suit your needs. What if I were to come in this afternoon at 3 - would that suit?"

"Uh, can you make it 2? I'll get my partner to be there with me."

Chris struggled to hide the smile in his voice. "2's great. I'll see you then Collette. Thank you for calling me!"

Chris pulled his car over, took out a pen and scribbled on the back of a business card "D/I chocolates to Marco".

## #17 - Team

Carlton Coffee Machine's Marketing Manager Rory closed the boardroom door and turned to his team seated around the table. Jack, Commercial Machines Product Manager, Kerry, Retail Machines & Consumables, and Paolo, International Marketing Liaison. "Thanks for coming in half an hour early guys. Jack's got a plane to catch." said Rory.

"How was Singapore?" asked Paolo.

"Yeah, really good thanks Pabs. There was plenty of positive feedback about the *Robusta Grande*. Punters liked the design, particularly the extra steam arm. I think the remote diagnostics feature is being loved in principle, but as we'd anticipated, it's going to take a while to get some early adopters to hook into using it. The Koreans will do it first I think. We'll need to get some testimonials. Be great to get an early adopter Aussie site up and running ASAP."

"At least we can say we've got it" said Kerry, looking at Jack and nodding. "We're genuinely able to position ourselves as technology leaders. That's something we haven't been able to do in ages! "Go with the leaders!", right?!"

Jack nodded solemnly. "Yes, the technology's not the problem. It's a. getting people to actually use it, and b. getting them to see the value in the price that's attached to it." Jack was great at pumping the tyres of the sales team, but let his guard down around peers and allowed himself to wallow temporarily in the half-empty bit of the glass.

"You're right Jack. So let's look at how we're going to do it. You all got a copy of the meeting agenda yesterday?" asked Rory. Nods. "Nothing I've missed?" Head shakes. "Right, big wins you want to share?" The team ran through the past few fortnights highs, lows, numbers update and any pressing challenges. It brought them to the main agenda item - the new sales promotion.

"Simone's asked us for some extra help. Not all the sales team are on top of what they need to do. Jack's off to WA to see some big clients with Jamie."

Kerry rolled her eyes. "It's not that bloody hard! It's a simple tiered volume discount model, a tie-in beans and service deal at a great price, and they've got all the promo materials - what more do they need?!" Kerry used to work in sales. Back then, such frustrated opinions were usually directed at the marketing team.

"Yes, well, we all need to make sure it works. There's a lot riding on our success here. If our promotions don't get implemented by the sales team, then we've got to wear that. We share the number. We're a team. So let's make sure we make it as easy as we can for them. Kerry - up for a day in Melbourne?"

Kerry rolled her eyes again and opened the calendar on her Blackberry.

## #18 - RaRa

Simone, Carlton Coffee Machine's National Sales Manager, clicked 'send' from the comfort of her super-tidy office.

"Good morning Team!

I've just come from a meeting with Kevin, who's extremely excited about this new promotion, and confident we've got the team, the plans and the energy to make it work. He sends his full support, and thanks you for all the efforts you've been putting in!

This promotion is a big deal for us. With the new *Robusta Grande* machine now in our fleet, we've got a full complement of technologically advanced machines to dominate every space we operate in, retail and commercial. By going to the market with really slick pricing and some great bundling opportunities with beans and service packages, we're giving the customers what they've been asking for, and forcing the competition to pay attention. They won't take long to respond though, so our window to really make the most of this chance is weeks rather than months.

You've all got your visit plans, with your 'A' clients and prospects atop the list. By now your promotional material should have arrived - call me immediately if it hasn't - and you know the pricing matrix back to front. We have to be really active - I'm asking a lot of you to increase your call rate by at least 3 a day, but the opportunity is limited, and your ability to make some great commission is purely going to be a function of how proactive you are, and how well you choose to implement the plan we built. You will own your result.

I'm incredibly proud of the work you've done to get to this point. Now's the chance for us to make it pay off. Over the coming month, I'll call each of you daily - if you need me in between, I'll make myself available. The marketing team are scheduling visits with some of you as I type - if you've got a compelling case to have them in your region, let me know ASAP and we'll make it happen.

Have a brilliant day, and remember that while we're here to maximise sales, we're also committed to being 'responsive, ethical and invested business partners' to our clients. Think for a moment about what that means. Finally, good luck (you're going to smash this!)"

Nothing like a bit of RaRa on your sales toast, thought Simone. I'm better off leaving the other part of Kevin's message out. Rather they're focused on sales than updating their CV's right now.

Simone picked up the phone and dialled Rory's number.

## #19 - Troubleshooting

"Good morning, Carlton Coffee Machines, Mary speaking!"

"Oh, hi Mary, it's Greg from Cafe Como in Darwin."

"Hello Greg, what can I do for you?"

"My coffee machine's not working."

"Oh, that's no good! Do you have a backup machine you've put into use for now?"

"Ahh, no. And I've just opened. And I can't serve coffee. Not good for a coffee shop."

"I see. I'm assuming it's a Carlton machine - do you know which model?"

"Uhh..., hang on." (muffled yells) "Yeah, it's an *Espresso Andiamo*."

"OK, thanks Greg. As we're speaking, I've sent an urgent page to our Darwin service technician. He should come back to me on the phone in the next few minutes. In the meantime, can I get a little more detail from you - do you have any idea what's wrong with the machine?"

"Err, no. It's just not working. I turned it on 10 minutes ago, the lights are on, but press a button, and nothing happens."

"OK. Greg, just bear with me for 20 seconds." Mary, one of two Customer Service Officers at Carlton, had spied Kostya, resident Barista, walking past and waved frantically. Popping Greg on hold, she explained to Kostya the problem, mining details from his purchase and service history in the CRM at lightning speed as they spoke.

"Let me have a quick chat to him - it sounds like a fuse."

Bringing Greg off hold, "Greg, while we're waiting for the service technician to call in, I've just grabbed Kostya, our resident Barista, who might have some ideas for you. I'll put you straight through to him."

"Greg! Kostya. Machine light's on, but nothing happening?"

"Hi Kostya, no, nothing. I don't know if you remember me, I was at one of your training courses a while ago."

"I do, ey?! We spoke about the Croc Farm and you gave me a guy's name at Adelaide Ruver Cruises! Let's see what we can do, try and sort this before the techo gets back to us. Now, have you got that little laminated troubleshooting guide I gave you at the course handy..."

## #20 - Proactive

Carlton Coffee Machine's gun Brisbane Rep Catherine pressed dial on her hands-free. Her car idled in the Gateway Bridge traffic logjam.

"Hello...(fumbling noises)... this is Chris... oh, hi Cat, how are you?!" Carlton's not-so-fancily-performing Melbourne Rep.

"Hi Chris, I'm really well thanks. How are you?" Once every week, Catherine made a quick call to each of her sales colleagues. It was a discipline she'd picked up from a previous manager - stay in touch, stay supportive, keep your finger on the pulse. It made good business sense, it let you benchmark your efforts, and besides, they were nice people all trying to achieve a similar thing. Catherine just wanted to do it better than any of them.

"Oh, not too bad. Had a couple of horror weeks, nothing's coming off for me, just one of those patches, you get them. HUUUUGE pipeline. Just playing that waiting game, you know?" Catherine didn't know. Catherine didn't play waiting games.

"How are you going rolling out the new promotional material, Chris?"

"Ahh, I haven't been into the warehouse to pick it up yet. I'll get there tomorrow. I've been talking it up a bit. Not too much interest. Everyone's got long pockets at the moment. What about you?"

"Well, I've got appointments with my A's diarised over the next 8 days, and I'll be in with the bulk of the B's within 15 days. We might not get pricing this hot again for a while - certainly the competitors will start their spoiler campaign quickly - so I'm trying to make the most of it. Have you been talking about the beans and service combo offer - a 1-stop-shop approach? I'm finding it particularly appeals to those super-busy coffee shops who you've already got a good relationship with."

"Eehhh, not so relevant in Melbourne. Beans guys have great relationships with the coffee shops. Service might be something. I'm telling them that their new machines won't break down so much, so service isn't as big a priority."

Catherine shook her head and changed the subject. They spoke families and the upcoming conference for a couple of minutes, before Catherine said "Chris, I've got to keep moving. Is there anything I can do for you?" Chris laughed.

"Oh, you're good! Nah, I'm due for a win! Got a great lead I'm following up today."

"OK, good luck, speak soon." Catherine hung up. Nice guy. Won't last. Now, to my next meeting...

## #21 - Innovate

"What if we did it *"Charlie and the Chocolate Factory"* style? With a finite number of 'golden tickets' in with the monthly client newsletter?" Rory, Carlton Coffee Machine's National Marketing Manager, was standing in front of his whiteboard, spitballing with two of his Product Managers and the National Sales Manager Simone.

"Yes... but then you can't control who comes along?" said Simone.

"Ah, you just rig it! Put them in the envelopes of the people you want there" said Kerry, Retail Machines & Consumables Product Manager. Paolo, International Marketing Liaison, nodded.

"No, don't like it, it's lying, and if it got out - and it would - we'd be in the shit" said Simone.

Rory chewed on the capped end of his whiteboard marker. "What if... we invited everyone who'd spent over the threshold amount in the past 3 years, and said 'first in, best dressed', and charged them a small fee - which we'd heavily subsidise - and we cap it at, say, 350 punters?"

The team were fleshing out an idea Simone introduced several weeks ago - setting up a VIP client event, bigger and better than anyone in the coffee machine industry had ever done before. A gala function, a trade expo extravaganza, special guests, special prizes, super pricing, new product launches, and the unveiling of a bold new loyalty concept - "Carlton for life" - a life membership investment clients could make, with guaranteed discounts, replacement and service commitments for as long as Carlton was in business.

"Don't we kind of dilute the 'wow' factor if we ask them to pay?" said Paolo.

"Well, then we only get those serious about partnering with us. And people perceive value in something they invest in" said Kerry.

"But by virtue of the fact they're on the invite list, they've already paid! They're our best customers, right? And we're going to be asking them to pay significantly more to become 'lifers'" said Paolo.

Simone, perched on the corner of Rory's desk, stood up and took the whiteboard marker from Rory's hand, ignoring the spittle on the lid. "How about this - we get each Rep to submit us their top 30 'A's, and we do a first wave of 'earlybird 3-days-to-respond super VIP' invitations. When we know how many gaps we've got left after those acceptances - gotta be in by, say, 4 days after they get the invite - we open it up to remaining A's and a few B's, invited by past 3 year spend. Capped at 250, allow 30-odd overflow spots for no-shows, and we don't charge. This is elite partnership stuff here. We demonstrate the value through hand-delivery of invitations. And we have order forms on the night - they'll pay in purchases."

Simone jotted on the board and the idea took form and generated next steps.



## #22 - Pop quiz

"Hey Chris, it's Kostya." Carlton Coffee Machines Barista-in-residence was on the phone to their underperforming Melbourne sales rep.

"Hi mate, how are you?" Chris was driving through the outer western suburbs, not 100% sure where he'd call in next.

"I'm tops, thanks! OK, pop quiz time! You ready?" Kostya had been charged by Simone, Carlton's National Sales Manager, to phone each of her sales reps twice a week for the next month, and in each conversation, ask them a series of 5 questions related to their new sales promotion. The aim was to ensure everyone's product and promotion knowledge was sharp, with the added benefit of encouraging a healthy sense of competition. Kostya was required to keep each sales reps quiz results confidential (except from Simone). If they got 4 answers right, they got a free movie pass. All 5 right on any given day, they got a double pass. Get 38+ out of 40 questions correct over the month, and they would win a Carlton *Café Sereno* machine worth \$950.

"Fire away, big man!" Chris hated this initiative. His product knowledge wasn't great, his retention of information poor, and the idea of being tested by the boss' minion was just unfair. He was sure they'd use this as a way to penalise him.

"The new machine, the *Robusta Grande*.... give me 3 benefits to a busy coffee shop owner. Not features - benefits."

"Ahhh - well, we're selling it at 20% off the normal list price at the moment..."

"Yeeeeessss... which means that..."

"Ahhh - they save money!"

"Fine, I'll take it. "Reduced capital outlay", "Potentially cost neutral" or "Free up expenditure for other business operating costs" are other ways to say it. What else?"

Chris hated pop quizzes.

## #23 - Co-travel

Carlton's Commercial Coffee Machines Product Manager Jack sat in the Qantas Club sipping a long black and stared at sales dashboard on his laptop. Lousy coffee. Can't believe we didn't win this tender, thought Jack, looking over at the line of business travellers waiting to push a button on one of the lounge's machines. Gold mine. The price was just too hardball. His phone vibrated on the table.

"Hey Jack, it's Jamie. What time do you board?" Jamie was the Perth Sales Rep Jack was travelling to spend a couple of days with.

"20 minutes. Pick me up at.....3?"

"Sure. I've got three appointments for us this afternoon and 3 in the morning, plus I'd like to spend some time role-playing the new promotion with you. I want to understand exactly how the numbers work, and there's a couple of things about the machine I'm not yet comfortable explaining. Oh, we've got that industry breakfast thing to go to as well."

Jack liked Jamie's style. He was green but keen. He'd come from a photocopier sales background - a hard-nose sales heartland - and wasn't afraid to roll his sleeves to make hay.

"Sure thing, we can cover off a bit in the car. Is there anything in particular you think we'll need for this afternoon's appointments? I can put something together on the plane if needed."

"Uhhhh.... not sure. If you've got a price comparison matrix, how we stack up against the competitors..."

"You should already have that, it came with your promo kit last week. Maybe we can run through all the resources you've now got." Why didn't they check?

"OK. I think we'll have it covered then."

"If you like Jamie, I can give you a hand with your territory planning map. I've been looking at how some of the experienced reps are doing it - we should be able to build you a plan that almost tells you where your revenue will come from, and what level of contact you'll need to plan for."

"Oh, that'd be great! Simone did it with me when I first started, but it didn't mean much then. OK, see you at 3."

Jack thought of the sales team as his VIP clients. They hit their goals, I hit mine. Besides, it's a chance to show my leadership skills, even though I don't have any direct reports.

Jack took another sip of his now cold coffee and winced.

## #24 - Decision

The final decision took less than a second to make. Kevin, Carlton Coffee Machine's MD, had decided that they would cull their manufacturing capabilities and focus their efforts on sales, distribution and service. Consider carefully, and when you need to decide, decide and move.

Kevin started tapping out the email that would inform the board of his recommendation, one he already knew they would support.

"Dear Board Members,...". Kevin paused and looked out his window. He felt the sense of relief that comes with making a hard but critical choice. At the same time, his heart was heavy. 19 people would lose their jobs in the next 6 months because of this decision. No matter that it was supported by several highly paid consultant's recommendations, his own months of analysing the changing marketplace, the obvious economies and profit-building opportunities that came with streamlining, and the fact that he was more than likely preserving 400 other jobs longer term. 19 families would soon face a tough life milestone because of a choice he'd just made. I get paid to decide, Kevin reminded himself. He remembered watching a Bill Clinton speech where he heard the former President make that statement. The hardest, most valuable think you can do as a leader.

"...with your endorsement, I'll bring the leadership team together next week and roll out a 6-month transition plan...". Kevin thought about the opportunities that lay ahead for the team. Their manufacturing partners were proving themselves to be essential and up to the task of supporting the continued growth of the business. Won't they be delighted when I tell them? I've got some handshaking and backpatting ahead.

"...we'll implement a redundant employee assistance program to ensure people are supported in a manner consistent with Carlton values...". Responsive, ethical, invested business partners. First port of call after this email needs to be Lynne in HR, give her the heads-up on the potential need to move quickly in planning for the disengagement and early walk-outs. Do the right thing. It was a tough mantra to follow in a profit-making business. It was the filter Kevin tried to run his every decision through.

Kevin tapped on his keyboard and the manufacturing plant whistle blew an end to the shift.

## #25 - Pre-call

Chris had one hand on the door handle about to climb out of the car when his mobile started chirping. Simone, his sales manager. Wouldn't they leave him alone?

"Hi Simone."

"Hi Chris. How's your day going?"

"Ahh, pretty good. I'm about to go into a coffee shop for a meeting, hopefully a chance to sell a *Robusta Grande*." Bit preliminary to say that, Chris thought to himself, but his stock in the company wasn't worth a whole lot right now, so couldn't hurt to give the boss the impression he was on the edge of glory.

"Oh, great! Where's that?" Chris ran her through the call he'd received earlier that day from Collette, the new owner of Manni's cafe, who'd called Chris on the recommendation of another of his customers. "Fantastic - make sure you drop in a small thanks to Marco, Chris." What was he, an idiot? "So you've got all the new promotional material to run through with her, Chris?" Crap. He knew there was something he was supposed to do this morning.

"Ahh, yeahhhh. I'm just going to see what she needs first, see if she's a tyre kicker or ready to go now. Then I've got a second call reason, I'll take in the promo details tomorrow." Chris made it sound like he'd thought things through.

"Chris, the material is really easy to run through. You've got to get it in front of people as quickly as you can - this sounds like the perfect opportunity. She called you, didn't she?" Simone knew she could do her block here. Take a breath. Set up the meeting. "Chris, the reason for my call is to let you know I'll be in Melbourne tomorrow. Can we catchup at my hotel at 10am please." Shit, thought Chris.

"Ahh, I'll have to check my diary Simone, I think I've got an appointment at 10... and my diary's in the car." Simone didn't know he too was in the car, but he had to think.

"OK, can you please let me know as soon as you get back to your diary? I land at 8. Chris, if you don't have the promo material on you, do you have a copy of the pdf on your laptop you can show them?" Simone knew full well Chris hadn't been to the warehouse yet, but she had to keep him focused on making the most of this call.

She's onto me, thought Chris. "Don't worry, I'll get 'em on board." Chris' eyes were welling.

## #26 - Mice & men

Chris, Carlton Coffee Machine's under-the-pump sales rep, walked into a buzzing Manni's cafe, his mind running 10 to the dozen. I could lose my job. Shit. How did this happen? Focus, Chris, you've got a shot here. A tall, thin 30-ish woman was giving instructions to a junior waiter. Chris approached the counter with a blank look on his face. The woman turned and greeted him. Chris introduced himself and asked if Collette was in.

"Oh, Chris, that's right! I'm Collette - nice to meet you, thanks for coming in today." Collette turned to the junior who was standing nearby, apparently wanting her attention a little longer. "What, John? Sorry Chris, excuse me a second." Collette followed John to the pass, where it looked like he'd mucked up the order sequence. Chris looked around. The coffee machine, an old unit that was no longer in production, was being worked hard by a young guy who was multi-tasking milk frothing and tamping. A *Robusta Grande* would fit perfectly in there, thought Chris. And it looks like they're busy enough to justify it. The negative thoughts he'd been having about his shaky job situation took a back seat.

"Sorry Chris, new staff. I don't know if I mentioned to you, we've just taken over."

"Business looks really busy!?"

"Yes, it's a good spot, we get a lot of the office workers, we're the only decent sized cafe on this block. And... John, what now?" Collette gave John some repeat instructions and turned back to Chris. "Arggh! Now... oh yes. Uh, Chris, I'm really sorry, my partner hasn't shown up yet. I think he's stuck in our other cafe."

"Oh, no problems." Chris' heart sunk. This wasn't in Plan A. "So, about your coffee machine..."

"Umm, Chris, I'm sorry to do this to you - maybe what you could do is leave some pricing and brochures on the machines, and I'll sit down with my partner today or tomorrow, and then call you back." Collette was glancing over Chris' shoulder at a party of 6 that had just walked in the door.

"Oh... OK. Um, I've got some brochures in the car. I'll go grab them." Collette smiled and nodded and excused herself to greet the new party.

Chris turned and headed to the door. When it rains,.....

## #27 - The money ball

"Wow, that's a lot of money! Can't you sharpen your pencil a bit more?" The fact the client used the word 'can't' instead of 'can' and added 'more' on the end made Catherine smile inside. It meant they weren't fully expecting any movement on price.

"You're right, it is the top of the line machine in this higher price bracket. Along with being a cinch to use, the *Robusta Grande* is the next step up from your old machine in terms of quality, efficiency and longer-term cost effectiveness. This pricing is a special launch offer, designed to help loyal clients upgrade without paying the premium that these elite machines attract. In 4 weeks, it goes up as we'd discussed. Factoring in the beans agreement, and we can make it even sharper - based on your average past 12 months usage, here's the additional saving you'd be making....".

Catherine put the pricing matrix in the clients view and circled the appropriate investment. She let it hang in the air a moment, waiting, waiting, holding her nerve against the silence, knowing the client was already pushing the price question to one side and deciding whether they'd move on it now, or wait until later. The client looked at the matrix, turned their head slightly to one side, pursed their lips and nodded silently. Time for the hug, thought Catherine.

"Cam, you've dealt with me for a few years now. Carlton stand by their coffee machines, and you know all about Barista School and just what it's worth. But even more than that, you know I stand by my clients. You've told me you need it, and my commitment is that I'll do everything I can to make sure you and your team get the most from this brilliant new machine. I'd suggest that the next step, once we get an order sorted, is for you and I to book an hour to sit down over a coffee and together come up with some promo ideas, cheat sheets, even a training roster, to make sure the machine is the money earner you need it to be. What do you think?" It wasn't the classical yes-no close phrasing her sales training courses advocated, but Catherine found that with her setup and personality, it worked just fine.

Cam looked Catherine square in the eye, still nodding, still pursing his lips. "OK. I've got to figure out the best way for us to be invoiced for this, but we'll do it. What do you need to get things moving?"

Don't ever tell me price is the biggest hurdle, Catherine thought. Our clients invest, not spend.

## #28 - Flag waving

Carlton Coffee Machines National Sales Manager Simone picked the performance management forms off the printer and stuck them in a plastic folder labelled "Chris". He'll be stewing about our meeting tomorrow... at least he should be, thought Simone. Surely he gets how badly he's travelling. Maybe he's not. Maybe he's in denial. Maybe he's oblivious to just how close he is to the door. Tomorrow's crunch day - a chance for him to demonstrate that he's willing, no, bursting at the seams to develop a plan with me, and then do whatever it takes to implement it. I don't need him to have all the answers, thought Simone, but I need to know he *knows* change is needed, and that he's steeled to make it.

The glowing red eye on Simone's Blackberry started flashing. An SMS from Rory, Carlton's Marketing Manager..

"Meet u at Convention Centre @ 5:00 out front". Simone and Rory were attending an industry cocktail event to welcome in the new Chair, a rival firm's MD. Carlton MD's had held the industry body lead role many times over the years - it was a good show of strength, of local industry commitment, and you got the inside goss on a lot of industry goings-on. At Simone and Rory's level, it was a good client, supplier and competitor networking event - a flag-waving ceremony and a chance to speak over a glass of bubbles outside the Carlton headquarters fishbowl.

"OK, just mtg w Kevin b4 he flies out - should be on time." 2 weeks ago, Carlton's MD Kevin had asked Simone to meet with him for 5 minutes each afternoon to update him on sales progress and next-day plans. This day-by-day reporting approach was driven by a global downturn, with Simone's team needing to shoulder a greater sales burden, and the never ending quest for cash flow. Simone didn't view it as a micromanaging imposition - rather a guaranteed audience with the boss each day, and a chance to fly her and her teams flag repeatedly. Simone had aspirations.

She put Chris' folder and her daily sales dashboard printout in her compendium, grabbed her computer bag and headed out her office door. What one snippet of wisdom can I try and get from the boss today? Simone's heels tapped on the floor as she walked down to Kevin's office.

## #29 - Brief followers

Rory looked at Simone's reply text and put his phone back in the inside pocket of his Hugo Boss jacket. Carlton's National Marketing Manager was standing in the lobby of the inner city building that housed their advertising and brand management partner, Endosperm. He'd just finished a meeting with their account manager Justin, where he'd been presented with some concept pieces for a campaign they'd launch in coming months. Rory pulled the draft flyer out of his compendium for another look. A handsome smiling young Italian Barista pouring a beautiful cup of coffee from a *Robusta Grande*, and behind him on the wall, a massive Karlsson clock showing 7:42am.

"Like clockwork.  
That's how your clients like their coffee.  
Predictable. Consistent. Without fail.  
That's how we design our coffee machines.  
To keep working for you.  
Because you're too busy for anything less.  
Critics choose Carlton.  
Like clockwork."

While he still wasn't 100% convinced about the "Critics choose..." bit, Rory was impressed with what the creatives had developed. Sharp. Clean. To-the-point. Most pleasing of all, they'd actually followed the brief. Position us high-end. Move the conversation away from price. Focus on reliability, time savings and the economy that comes with reduced breakdowns. A nod to the Italian heritage too. Rory liked what he saw. He'd straw-poll Simone with it at the cocktail function tonight.

Why can't everyone follow the brief I give them, thought Rory. It was why Endosperm were viewed differently to most of their suppliers. Clever, niche-expert external team members. And they delivered like clockwork.

Rory looked at his watch and headed out the door.



## #30 - Opportunity

Chris stood by the open boot of his car, still shellshocked from his boss' request to meet tomorrow morning. Carlton Coffee Machines hapless Melbourne sales rep knew he was in strife. His numbers were poor, his boss Simone didn't think much of his laconic approach to selling ("Clients don't like high pressure people", rationalised Chris) and these damn pop quizzes he'd been subjected to in recent days... well, he wasn't getting a commendation, that was for sure.

Chris leaned into the boot to grab a brochure for Collette, the owner of Manni's cafe, so she could take it away and review it with her business partner. Why is everything so damn hard? Why can't people just make a frigging decision? Chris' phone vibrated in his pocket. Maybe Simone's decided to save herself a plane fare and fire me on the spot. He looked at the screen. Unknown number. What the hey. Chris answered.

"Hello Chris, this is Shane from Superforce Recruitment. Can you speak confidentially for a moment?" A recruiter. Chris furrowed his brow and said he could.

"I've been given your name from an old colleague. Chris, I'm recruiting some new salespeople for an FMCG startup in Melbourne. The role is to sell a range of gourmet food products to high-end cafe's, deli's and grocery outlets. It's a fresh, innovative product line, and an employer that pays at the top end of the market. They're a great bunch, really look after their people. And they want to talk to you Chris. Are you keen to set up a chat?"

The 30 second sentence did more for Chris' posture than any Chiropractor could. Flattery gets you a little deeper into the conversation. Be cool, Chris.

"Well, that's very nice! Who did you say gave you my name?"

"Uhh, we've been speaking to a number of people, and your name has come up a number of times."

"Oh, OK. Well, yes, it can't hurt to have a talk. You mentioned this role pays at the higher end of the range - can you tell me how much?"

"Ahh, I can get into the specifics of the package at an interview - it'll be negotiated in line with the calibre of the candidate, but be assured, it's generous." The interviewer's initial enthusiasm seemed to be evaporating quickly.

"Right. OK. Yes, I'm happy to have a chat. When would suit you guys?"

As the recruiter suggested some dates and times, Chris realised he hadn't asked the company name. No mind, I'm sure they'll tell me in good time. I'm in demand, thought Chris. Put a bit of *that* on your toast, Simone. A flyer blew out of Chris' boot and he didn't bother grabbing it.

## #31 - Rainmaking

*"Wake up in the mornin' feeling like P Diddy. Got my glasses, I'm out the door, I'm gonna hit the city..."* Kesha's lyrics pumped through Jack's plastic airline headphones as he scribbled notes on his marketing plan at 35,000 feet over the Nullarbor. Now there's a girl with an at-'em attitude, thought Jack. Maybe that's the sort of mindset our sales team need. Minus the teeth-brushing with whiskey bit.

Jack, Carlton Coffee Machine's Commercial Product Manager, was flying to Perth to co-travel with their sales rep Jamie. They were presenting a united front to give their new sales promotion a big shove, and Jack was keen to give Jamie, still relatively new to the business, the run-up he believed would help him succeed. Invest your time with the high potentials, Jack's boss Rory had told him. They don't always cry out for your help like the woe-is-me's, but it's where the fastest and fattest ROI's going to come from.

Jack put his marketing plan to one side (dog-eared, coffee stained and covered in pen marks as it was) and pulled out an old interview series he'd found back when he was a sales rep. It offered horse's mouth perspectives on the success habits of diverse gun sales pro's. Jack had done OK in sales, but it wasn't his passion - he had a strong creative bent and he was more enamoured with dressing up products and improving supply chain processes than he was with initiating and leveraging transactions from fleeting relationships with one client after another. That was Jamie's strength - Jack could see he had a bright future ahead of him. I'm going to make Jamie a special project, thought Jack. Extra help, extra attention, tyre pumping - I want him in my corner. He'd give Jamie his copy of the interviews. If the guy's star is rising, seems smart to become a mentor now. Those cheering at the start line get offered first seats on the coat-tails.

"Ladies and Gentlemen, this is your first officer speaking. We're anticipating a little turbulence ahead - shouldn't be too bad, and we'll get you through it as quickly as we can. If I could ask you to all please return to your seats and fasten your seat belts. I'll come back to you with more shortly. Thank you."

Forward looking. Strap in for predictable bumps. Manage expectations early and keep the chatter going. Jack would relay this analogy to Jamie when he landed, before they sat down together and tightened Jamie's plan to take names and kick arse with the new promo.

Jack switched the dial from Kesha to Alan Kohler interviewing some clean tech startup guy on the business channel. I love the different headspace on offer up here, thought Jack.

## #32 - Luck

Well, how would you be, thought Chris. One door looks like it's closing, and another opens up. Smiling ear to ear, Chris walked back into Manni's with the brochure he'd promised Collette he'd leave for her to go over with her business partner. Collette was busy serving hot chocolates to a table of high school kids (late lunch? Early minute? Wagging?) Better stay focused on the here-and-now, Chris told himself. Still a good opportunity for a sale, even if it might be delayed a bit. He stood near the cash register at the counter.

"Can I help you sir?" asked a waitress he hadn't seen earlier.

"No, I'm just waiting for Collette."

The waitress looked at Chris like he'd spat in her sandwich. "Right. Well, would you mind waiting off to the side please sir, this is a customer service area." Chris pulled his lips up in a half smile without any eye involvement and stepped 2 paces to the left. Snotty cow. Who teaches customer service these days? Collette returned to the counter and saw Chris.

"Oh, great, thanks Chris. I'll review it with my partner tonight. Is the pricing in there? Marco told me you'd look after me?"

"Ahh, I've got the list pricing in there. There's a couple of machines - I'm sure we can work out a good price once you know what you want..." Collette furrowed her brow.

"Chris, I'll be honest, I've got a couple of other prices in, and I want to know if you can beat them. Can you please write your best price in there now, and I'll talk to my partner and we'll decide tonight."

Painted into a corner again, Chriso. No chance to talk them through the new promo, the upsides of the technology, the economies that would come with bundling in bean purchases, not to mention the value Mr Super Chris himself brings. Ahh, bugger it, I need a win, I'll rip the guts out of the margin just to get it, thought Chris. He reached for his pen as a man walked up to the pair.

"Sorry I'm late guys, got stuck at the other Cafe. Hi, Chris, isn't it? I don't know if you remember me? John! I used to work in a coffee shop in Frankston a couple of years ago, Charlie's, you used to call on us? I was stoked to hear you were still in the game, I thought you were a good rep. Hey Collette!" John kissed his partner on the cheek. "Shall we go out the back and have a quick chat? I'm keen to get this old machine replaced. Oh, and Chris, I found this brochure outside, you must have accidentally dropped it. I took a sneak peek - the new machines look great!"

Luck be a lady tonight, Chriso.

### #33 - Gremlins

"Good afternoon, Carlton Coffee Machines, Mary speaking!"

"Hello, I'm calling from The Waterline Hotel, and I've got a problem with a bill we've just received from you."

"Oh, I'm sorry to hear that! What seems to be the problem?"

"Well, the original quotation we had for our new coffee machine was \$9,500 plus GST. We accepted the quote, we received the machine weeks ago, and the invoice has just arrived, and it says \$10,450 plus GST."

"I see. Would you bear with me for a moment while I bring your details up sir?" Mary tapped quickly, searching "Waterline" and looking for top line items in "Purchase History". There was no facility in their CRM system that linked "Quotations" - these were done manually by the individual sales representatives. They could however create a note or manually attach a file in the customer record, which Mary could access. No such note here.

"Yes, I can see it here sir - I'm sorry, I didn't catch your name?" She knew he hadn't offered it.

"Clayton. I'm the hotel finance manager."

"Oh, I have a son named Clayton! There you go! Yes, I can see your invoice on the system. Clayton, I don't suppose you have a copy of the original quotation handy, do you?"

"No. I don't know we ever received anything on paper. The Food and Beverage Manager tells me it was a verbal quotation, but the salesperson definitely told us it was \$9,500 plus GST. Or \$10,450 including GST. It's the same either way."

"I understand. I'm sorry about this confusion Clayton. What I'll have to do is get in touch with the salesperson so we can get this sorted out for you. It looks like the salesperson was.....(scanning)... Chris. I know he's on the road today - I'll try getting onto him this afternoon, and if I come back to you early tomorrow morning, would that be OK?"

"Sure. We just need to get re invoiced for the lower amount."

"OK Clayton, I'll come back to you first thing tomorrow. Again, our apologies for this confusion - we'll get it sorted. Thanks for calling, bye for now!"

One day, thought Mary, I'll teach these sales reps the importance of writing things down. She made a note to call Chris after she came off her break. Leave it to Mary to sort things out, she thought - I'm a Mum at home, and a Mum here. Mary hit 'divert' on the phone and walked towards the tea room.

## #34 - Learning

Aside from a natural ability to read people, a ferociously competitive desire to win, well-honed effort prioritisation practices and a clever way with words, there was yet another reason Carlton Coffee Machines super-rep Catherine was a gun. As sales trainer Brian Tracy put it, she kept her saw sharp.

Sitting in a coffee shop sipping a green tea, Catherine was reading a chapter of *We are all weird*, a new book from marketing agitator Seth Godin. She looked at a quote on the page. "*If you persist in trying to be all things to all people, you will fail.*" Amen to that, thought Catherine. Pick your handful of potential help recipients carefully, then give what you have to help them.

Catherine chose to invest one hour a week in a self-directed learning session - an 'appointment with herself'. Parking herself in a different coffee shop each week - one she would later target for future sales - Catherine would pick the eyes out of a new sales, marketing or leadership text, or review an old one she knew contained gold, or even to take a pen and paper and summarise all she'd learnt throughout her professional travels. It was done in work time, it was scheduled in a regular 'time home' and she booked her other meetings around it. Catherine thought of it as her secret weapon - doing something everyone else knew the value of, but that never got done because most people choose to live on 'the treadmill of urgent reactivity'.

Catherine's colleagues often wondered how she managed to keep up this weekly non-client-touching commitment without fail. Catherine was the first to admit it was hard. As the most successful sales rep at Carlton, she had more than enough client visits, internal follow-ups and new prospecting calls on her to-do list. Self development was the first thing most busy salespeople dumped. It was tough to put a short-term ROI on reading, and it meant turning the phone off for an hour and saying 'not now' to some urgent last minute noises that arose. But Catherine knew the benefits were many. Mental refreshment, fresh ideas, galvanising proven practices, time to think more broadly than beans and milk spouts, even word-crafting inspiration. That so few others do it is my opportunity, Catherine thought.

She took another sip of her tea and let her perspectives be challenged.

## #35 - Fingertips

"You did it for WHAT PRICE?!" Simone was apoplectic. In front of her sat Chris, Carlton Coffee Machines hanging-by-a-thread sales catastrophe.

"They'd been offered a really cheap price by the competitor, and they really wanted to do business with me" offered Chris, a quiver developing in his voice, the colour draining from his face.

The pair were sitting in the lobby lounge of Catherine's hotel. She'd flown in early that morning for a meeting with Chris to discuss his (lack of) performance. On arrival, Chris had proudly announced he'd gained commitment for the purchase of a new *Robusta Grande* machine from the new owners of Manni's cafe. Granted, they'd told him they needed a couple of days to get finances sorted before signing anything, but Chris had told Simone the verbal he'd been given was solid. Trying to quiet her mental alarm bells, Simone asked how much margin was in the deal. That was when the wheels fell off.

"Chris, not only have you gone in under the margin threshold you know you're limited by, you've completely disregarded the new promotional pricing matrix we'd worked up for the new machine. You've not secured the beans business to go with it, have you? Which means that our opportunity to make up for this loss leader is gone. AND you tell me it's not even on paper yet - tell me what's to stop them going back to the competitor and shopping this price? AND you tell me they really wanted to do business with you - so why on earth would you go and rip the heart out of the margin?"

Chris was near tears. What he'd thought might be the saviour of his tottering career as a sales rep at Carlton had likely just become the final straw. He was speechless. He sat looking down at the table, trying to think but unable to. The silence hung for seconds as Simone composed herself and carefully prepared her next words.

"Chris, I'd come here to try and give you a pep talk, to let you know that your sales are terrible, but that I want to try and help you turn them around. This latest demonstration of negligence, of an unwillingness to follow the sales processes we put in place for a very good reason, let alone the fact I don't believe you're likely to even get this deal - and if you do, it breaches the rules and there's no profit in it - leaves me little choice. I'm instructing HR to deliver your one and only written warning. I'll have them forward it over this morning, and we'll sign it together this afternoon. From today, I'll be putting in place a performance management process for you, where you and I will speak and run through a process every day, twice a day, until we get things turned around." Every word stung Chris like a cheek slap.

"Chris, you're a good guy. People like you. I want to see you be successful here. But you're not performing, and worse, you're not following the processes we put in place to help you perform. It has to change. Or we'll be parting ways. Very soon."

## #36 - Recap

Freeze a moment.

Take a quick look around the Carlton Coffee Machines business (a team committed to being 'responsive, ethical and invested business partners' with their B2B clients).

In Carlton's Adelaide head office, Aussie MD Kevin is behind closed doors with his HR Manager Lynne, beginning proceedings to let 19 manufacturing staff go over the next 6 months. His heart hurt, and he popped two more Nurofen into his mouth.

National Marketing Manager Rory is in his office this morning typing nice-to-see-you follow-up notes to industry folk he bumped into at a networking function last night. He doesn't yet know it, but one of his product managers is walking towards his door with a resignation letter in hand.

There's high performing Brisbane Sales Rep Catherine, who, having planned her day for maximum ROI, has been on the road nearly an hour now, about to walk into yet another well-prepared-for sales meeting. She knows what she wants and how to get it.

Outside the head office carpark, Carlton's Barista-in-Residence Kostya is sipping a short macch and talking to Mary from Customer Service about a group of new customers coming in that morning for a training course. Kostya is giving Mary the guest's names and some background so she can make them feel at home from the get-go.

Over in WA, Commercial Machines Product Manager Jack is on the hotel treadmill churning out 5km before he showers and waits in the lobby for sales-rep-on-the-rise Jamie to pick him up for a day of co-travelling. Jack's thoughts that Jamie was hot property were confirmed in some customer meetings yesterday afternoon, and Jack would work to integrate himself into Jamie's business plan today.

And then we've got National Sales Manager Simone, sitting opposite a forlorn, underperforming Melbourne Rep Chris, who's just been informed he's about to go onto a performance management plan as a last dice roll 'motivating' tactic. Or as the means to push him out - either way, as far as Simone was concerned, things would change for the better.

In the sparkling entrance foyer of Carlton's Headquarters sits a demonstration model of the new *Robusta Grande* coffee machine, the company's newest growth vehicle. A technologically advanced machine designed with Human Factor Engineering principles (idiot-proofed), the machine was being launched with a well conceived, tested and attractive promotional strategy. All it needed was people to execute it. Implement the plan. The company's continued success hinged on it.

Rory heard a knock on his office door.

## #37 - Succession

"Hey Kerry. What's up?"

Kerry, Carlton's Retail Machines and Consumables Product Manager entered her boss Rory's office and sat down in the guest chair.

"Rory.... I'm resigning." In her hand was an envelope with Rory's name on it.

"Oh!" Rory let the shocked look sit on his face a moment, waiting for Kerry to continue.

"I'm sorry to just drop it on you like this. I've really enjoyed working here, Carlton's a great company, and you've been a great boss Rory. It's just... time for me to take on a different challenge."

Rory nodded with his eyebrows raised and mouth firmly set. He knew this was coming. Aside from the hushed phone conversations he'd observed Kerry having in recent weeks and the drop-off in her otherwise high activity levels, he'd been tipped into a rumour just last night at the industry networking function. That Kerry was headed over to one of their suppliers to take on a national marketing role. Smaller beans company, but a fancier sounding job title. Rory tried to maintain just the right amount of surprise and professional sadness in his face. She'll be missed, he thought, but not that much. The current job market's not short of Product Manager wannabe's that would love to join a business like ours. Besides, Kerry's personality annoyed him.

"Well, I'm really sorry to hear that Kerry. You've done great work here and you'll be missed. What are you going to do?"

"Ahh, I'm still looking at a couple of things, nothing's quite confirmed. It won't be with a competitor to Carlton though."

Liar. Rory knew precisely where she was going. And even though it wasn't a competitor, it was a business that would benefit from the knowledge of Carlton's inner workings. And he didn't really trust Kerry as far as he could throw her. His next move, once Kerry left his office, would be to speak to Lynne from HR to make sure he could have her off the premises before day's end. Better to move on quickly. Limit the impact she can have on those left behind. And Rory had work to do to get a couple of the prospective replacements he had in mind engaged. A former boss had taught Rory to always keep a bank of successors warm. It forced him to keep an active network, it allowed him to benchmark his team against others in the industry, and a resignation or firing was always around the corner.

"OK. Well, here's the process we'll need to go through now..."



## #38 - Hard ball

Jack and Jamie sat in the car outside a beachside hotel in Perth.

"The F&B manager in here is pretty new, and he's come from another account that had two Carlton machines and they also bought their beans from us. I've only met him once, seems like a good dude. When we spoke, he indicated that he likes our machines and they're spending a fair bit on their bistro refurb. I think we can go in fairly hard ball, preserve some margin. I don't think we need to use the matrix pricing. I think we can get more. He loves us, they're cashed up, and if I focus on my service, we don't need to drop our trousers." Jamie, ex-photocopier salesperson, was explaining his plan to Jack, Carlton Coffee Machine's Commercial Product Manager.

"Mate, don't get me wrong, I love the idea of preserving margin. I guess the problem is, if we're not consistent with what we offer the market via this promotion, and word gets out to someone who didn't get the deal, we're up for credits and we do our client relationships more long term harm than good." Jack truly was delighted by the revenue-maximising way Jamie thought. He knew however that following the promo plan was worth more than just this one little hotel. "Besides, you've got a chance for a great win here - get the guy in love with the kit, ready to buy at a higher price, and then wow him with the pricing, and you've galvanised a friend for life. Maybe we can even make them a referral site - get some testimonial for future promo's?"

"Yeah.... it's easy money though, Jack. You're the boss though - I'm confident I could get him buying at the higher price, but you wouldn't recommend it?" In part, Jamie was trying to impress Jack. In part, he backed himself to negotiate a higher price. And in no small part, Jamie was thinking of his commission cheque and the impact the discount matrix would have on it.

"Honestly mate, you might give a little bit more in this one small battle, but it'll help you - us - win the war. I've got no doubt you can get more. Use this as a way of getting an established base of *Grande's* that you can then leverage as reference sites for more sales once the promo has finished." Jack loved the fire, the deal-mongering Jamie was trying to bring to the table.

"Righto. What I'd love you to do then Jack is play the role of the technical guru, flown in from East to answer the questions and make him feel special. I'll start off by asking him again how he found the Carlton machines at his last place - I know he loved them, but I'll get him to say it again to you. Then we'll ask about what he needs here...."

In the car on the Esplanade, a call plan was hatched in line with the promotional strategy.

## #39 - Hospitality

"Good morning! You must be here for the Barista training course!" A chipper-sounding Mary greeted the group of five standing in the Carlton Coffee Machines reception area. Nods and positive murmurs. "Well, welcome to Carlton! I'm Mary - hello...?" Mary extended her hand to the person nearest her, who took it gently and introduced himself. Mary kept the smiles and handshakes up around the group of three men and two women.

"So, I understand you're from the Regal Group of Hotels, is that right? And I believe some of you have travelled from as far as Cairns?" More nods and light banter. "Well, we hope you love Adelaide and we'll take good care of you here. First things first - coffee! Who'd like a cup?! We've organised a little morning tea for you in our cafe, and then at 10:45, Kostya, our resident Barista will take you through to our training lab and get your program started. If you all want to follow me down this way, I'll point the bathrooms out as we go."

Mary led the small group down to the cafe, where Carlton's MD Kevin was pouring himself a cup from one of their smaller domestic machines.

"Hi Kevin! Ladies and Gentlemen, a fortunate surprise. I'd like to introduce you to Kevin, Carlton's Managing Director. Kevin, this is the team from the Regal Group of Hotels, here for an advanced Barista course with Kostya!" Mary balanced saccharine-sweet and professionally-polished like a skilled high-wire walker.

Kevin put his coffee on the sink, put on a restrained senior executive's smile, and repeated the handshake drill. "Hello! Welcome! We're very glad you could come to Adelaide - some of you will have travelled, yes? OK. Well, please, make yourselves at home. Mary and Kostya will take great care of you, and Kostya's course is something we're very proud of. It's unique in the industry, and it's our commitment to help you get the most from the machines your company has invested in, and that you feel comfortable and confident in using them." Kevin slipped into Press Conference Sales Pitch mode without batting an eyelid.

"We're passionate about our customers at Carlton. We want you to feel like part of our team. And we appreciate your support. Mary, you've no doubt arranged some morning tea for our guests?" Mary smiled and nodded like a First Lady, knowing that Kevin knew she had. Theirs was a well trodden song-and-dance routine.

"Fantastic. Well, I'll leave you in Mary's capable hands. I hope you enjoy the course, and I look forward to seeing you again!" Kevin smiled and moved. The humble big cheese, the personal touches, the set-a-spell, take-your-shoes-off hospitality. All part of the deal.

The now puffed-up guests followed Mary into the impressively decorated cafe.

## #40 - Move quick

Kevin walked down the corridor towards his office, coffee mug in hand, mentally turning over the 42 tasks on his day's to-do list. A meeting with the Board Chairman in the afternoon to discuss the restructure, phone link-ups with the MD's of 3 of their supplier companies to start contract expansion dialogue, video links with two of their overseas distribution partners to review sales progress, an industry briefing paper to write... Kevin nearly spilt his coffee when he narrowly avoided a collision with his National Marketing Manager Rory.

"Whoa! Sorry Kevin. Hey, have you seen Lynne?"

"I've got her working on something for me - she'll be back in this afternoon. Should get her on the mobile. All OK?" Rory was one of Kevin's direct reports, and Kevin knew he didn't spend as much time with his Marketing Manager as he should. He's a big boy though, very competent, and his current number one task is very clear, thought Kevin. Execute the *Grande* promotion strategy.

Rory looked around to make sure no-one else was in earshot. "Kerry's just given me her resignation. Not a big surprise. Heard a whisper about it at the cocktail show last night, and had suspicions. Going over to a supplier, Avolo Beans, being coy about. No direct conflict of interest, but I don't trust her, and want her out today. Just want Lynne's OK and guidance."

"Not worth trying to keep?" Kevin didn't believe in offering second chances to deserters, but he put stock in his direct report's opinions.

"No. OK operator, key retailers didn't mind her, but never going to set the world on fire. Mentally checked out. Should be easily replaced, and could get a better fit with some of the others in the team."

"OK, just get the forms from Di, I'm fine with it, and sort out details with Lynne when she's back. Got her replacement lined up?" Kevin relied on Rory to have his ducks in a row, even in these curve-ball situations. They always happen, so they should be planned for.

"I've got two externals I've been grooming, and one internal that might be a good fit, I'll speak with Sim about it first. Set some meetings up in next few days. We'll get it done quickly. More focused on getting Jack's *Grande* promotion humming. And Kerry leaving actually creates an opportunity for me to jump in front of our bean suppliers and re-look at that whole arrangement. It's a huge potential growth space for us, Kevin." Not knowing the restructure process Kevin was working on, Rory had no way to know how prophetic his words would be.

"Right. Let me know if you need anything" said Kevin, and he kept walking. Minor blips. Opportunity perhaps. I'll make some time later this week with Rory, he thought. Or maybe next. Bigger picture things to focus on now.

## #41 - Pick'em'up

Simone sat in the passenger seat of Chris' car. The air between them was thick. Think, Simone, think. You've got to get him up as quick as you can. Simone had considered leaving Chris to his own devices for the rest of the day. After the performance management conversation they'd had that morning, she knew her underperforming sales rep would sulk and stew awhile. Everyone goes through a grief curve after a conversation like that.

"So, what's the plan for this next call?" Simone asked with as much friendly positivity as she could muster. Chris spoke monotonously.

"A call-back to Marco. He's looking at buying a *Robusta Grande*. Want to give him details of the promotion, see if we can get him on a beans deal too. Need to thank him for referring me to Collette."

"Great! Have you got all of the materials from the warehouse?"

"Yes." Silence. Ah, this won't go well, Simone thought.

Simone's mobile buzzed in her compendium. Some respite. She answered. It was Rory.

"Can you speak Sim?"

"I'm with Chris, we're heading to a client meeting."

"OK. Keep this under your hat. Kerry's resigned. She'll be gone by day's end. I'm looking to move pretty quickly to replace her. Will work with Lynne on the process, but wanted to suss out your thoughts on your Sydney rep as a candidate."

"Umm... ok, leave it with me. I'll give you a bell later this afternoon to discuss."

"Righto. How's your day going with Chris?" Rory knew the conversation Simone had been planning to have.

"Sure. I'll speak to you a bit later. Thanks." She cut Rory off. Chris, sitting less than 2 feet from her, was stone faced, turning his car into the carpark out front of Marco's cafe. "Chris, before we go in, do we need to talk any further? How do you want to use me in this call?"

Chris knew exactly what he wanted her to do right now, but being frank would cost him the last glimmer of hope he had of keeping his job. "No, we'll be fine. I'll introduce you, I'll thank him for the referral, I'll run him through the new deal, we'll talk about beans, and play the rest by ear."

Simone nodded and decided to let the cards fall where they may. On your shoulders now, Chris.

## #42 - Deal on

"Chris! How are you, Sir?" Marco was in a particularly jovial mood. The cafe was only half full, but had a nice buzz about it.

"Hi Marco! Really good thanks, how about you?" Chris, Carlton Coffee Machine's almost-gone sales rep, had chosen to put his game face on for this meeting. After his boss Simone, who stood alongside him in Marco's cafe, had earlier told him he was on the thinnest of ice and now being performance managed, Chris had decided he'd go down swinging. Here was a chance to stick it to her.

"Ah my friend, it's been a busy morning. Hello, lovely lady! Chris, have they replaced you with someone much better looking?" Marco joked and eyed the statuesque Simone, resplendent in her power suit and smiling back.

"Marco, this is Simone, my boss from Adelaide. Simone, this is Marco, a very loyal Carlton customer."

"Oh, Chris, you're smooth! Hello Simone, lovely to meet you! You've got a good guy here, he's a lovely bloke, Chris. And he's come in here to look after me with some great pricing on a new machine, hey Chris!" The smile hadn't left Marco's face the whole time. Must've sold a bucketload of Cannoli this morning, thought Chris.

"Indeed I have Marco. But before I do, I want to thank you for mentioning me to your friend Collette. She's looking at the same machine you and I are talking about. I really appreciate you spreading the good word." He'd forgotten to get a thank you gift. Maybe when the deal goes through, thought Chris.

"Ah, happy to! She's a good operator, Collette. You look after her, Chris. I don't give referrals lightly! You can thank me with a sharp price. Remember 42 cups Chris? That's the extra I need to sell each day to pay for the new machine." Marco reminded Chris of his ROI calculation.

"I've been thinking a lot about that Marco, and I think we can help you."

What happened next would take Marco, Simone and Chris himself by surprise.

## #43 - Drum beating

Simone sat in the Qantas Club and clicked 'Send' on her laptop.

"Hi Team!

I hope you've all had a great day, and I want to offer you all a huge congratulations! I've just seen that 4 *Robusta Grande's* went on the system today, and from speaking to a few of you, that there are at least 5 more that will be on in the next 24 hours. That's a fantastic start to this promotion - one you all know the importance of - and a really good way to build some momentum and a referral foundation you can use to sell more. I'll be working with dispatch to make sure we get these out the door and to your customers as fast as we can.

Some feedback on the economics of the machine for you - Chris and I visited a cafe owner today, who is a pretty loyal Carlton man, but wasn't afraid of playing hardball to get the best price. He gave Chris a formula he'd calculated - that he needed to sell an extra 42 cups of coffee per day to pay for a new *Robusta Grande*.

My hat goes off to Chris here - he did a sterling job of dealing with this objection. Chris asked the cafe owner some questions about his old machine's downtime, his current service contract spend and to what level he was aiming to grow business. Then Chris walked him through our promotional matrix, and with some rough numbers showed Marco that, with projected time efficiencies the new machine might offer, a reasonable reduction in downtime that would result from our service package (and from removing their old clunker), as well as the new reduced promotion price, that in fact the new machine could come in at a break-even point over 4 years. To top it off, Chris explained the extra economies that could come from purchasing our beans as well, and made the package seem so fiscally sensible that the client had little choice *but* to say yes. Voila - one *Robusta Grande* order. It was a great sales call, and I've asked Chris to write it up as a case study to share with you all. Really well done Chris! A couple of other housekeeping things..."

Simone had been gobsmacked. Where had he pulled that from? The fear of losing his job? Had he known what to say all along, but for some bizarre reason, just hadn't been? The performance management contract was still going to happen, and two subsequent calls Simone had joined Chris on had shown worrying signs of his lax approach, but even they'd been better than she'd anticipated. Chris had even warmed up to the fact he'd now have to check in with Simone each day (an opportunity rather than a punishment?), and by the time he'd dropped her at the airport, their conversation was almost friendly.

People. Simone picked up her phone and called Rory back.

## #44 - Square Hole

Mark sat in his Sydney home office waiting for the printer to finish spitting out the 200 notes he'd typed. Short personalised letters he was sending to the biggest 200 Carlton Coffee Machine customers in his patch of NSW dirt. The promotional brochures and pricing matrix were great, but Mark had a big territory to cover, and he wanted as many of his clients to know about the promotion ASAP. He was also a big believer in crafting personal messages for each client, so he'd sit down in front of the TV tonight and handwrite a short note on each of the personally addressed letters that he'd post, stapled to the front page of the brochures with a business card.

Mark had been a sales rep with Carlton for about 18 months, and while he didn't love it, it was paying the bills and he knew it was a necessary stepping stone into bigger roles. He was only 24, only a couple of years out of Uni (Bachelor of Marketing), and he had big dreams. MD level dreams, a ladder via marketing management roles, maybe some time overseas in product development. Coffee machines weren't really ideal - he loved the idea of a sports brand or something funky, maybe energy drinks - but Carlton were a good starting point, and their products weren't bad. Mark was clever enough to get there, likeable too. He just had to earn the right stripes.

The phone rang. It was Simone. He let it go to message bank. He liked his boss, but he knew she'd ask him where he was and what he was doing, and he didn't feel like lying. Mark believed in creating his own local marketing support materials to go with what the marketing department produced, but he knew Simone didn't share his belief. Get out and see customers, that's where you'll have the impact, she'd say. Leave the marketing to the marketers. Mark knew that face-to-face selling was the most effective way to grow business... for someone else. He was a bit of a round peg in the sales team - the only one without a sales pedigree or passion for the sales call. Despite this, his numbers were good, and he negated his prospecting call reluctance with a concentrated effort on a smaller number of 'milk run' visits to existing loyal clients where he worked the consumables business (money for jam, he thought). That, and a continual stream of local marketing prods to the rest of the market.

"Hi John, hope you and the team are well! Here's a brilliant new promo we're running - think it's right up your alley. I'll call you next week and see if we can grab a cuppa to discuss! Cheers, Mark". Mark's penmanship wasn't terrific, but he knew it was always read - wish you could say that for all marketing material.

On the other end of Mark's voicemail, Simone left a message asking him to call her about an opportunity he might want to consider.

## #45 - Mojo

"Your shout then, moneybags!"

Chris's mate Nick slapped his friend on the back and turned back to the group of guys standing around the wine barrel. A routine after-work gathering in their local beer garden, Chris had been telling his mates about the great sale he'd chalked up today. He omitted the bit about the performance management process his boss had put him on. Maybe after a few more beers.

Five cold pints of Coopers Sparkling landed on the bar. I'll convert these VB-drinking philistines yet, thought Chris. Handing one to each of his mates, Chris went on to tell them his other good news.

"To top it off, I'm being headhunted! Some dude calls me out of the blue yesterday, from a recruiter, tells me they're setting up a new gourmet food company, got my name from another happy customer, wants to talk to me, see if I can help them launch their business."

"You're on fire, big man! What do you know about them?" asked Chris's friend John. Himself a details man, John knew doing homework and due diligence weren't Chris's strengths.

"Nothing really, thought I'd go in, have a chat to the bloke, suss it out. Some crowd called Superforce - never heard of them. He tells me the money is top of the line."

"What, fat base, or open-ended commission? You better be careful there mate. Might be one of those "earn as much as you like" jobs where you earn squat if you don't sell anything?"

"Dunno. But as I showed today, I am a sales machine" said Chris loudly, with what his friends knew to be false bravado. "I've got my mojo on, and if they want this impressive package, they'll need to be offering an impressive package!"

"Mate, I've seen you in the shower, and there's nothing impressive about the package!" Chris's mates roared with laughter, drawing glances from other groups in the beer garden.

Not three metres from Chris, looking like he was waiting for colleagues to arrive, sat a stranger punching out a text message.

"Hey Shane. How small is this world? Sitting in beer garden, eavesdropping on some guys talking about your company. One's being headhunted for a food sales role? Will keep ears open for you..."



## #46 - Pro stumble

"We had a Carlton machine at the last place I managed, and it was nothing but trouble. I don't know why the owners put one in here. Now it's having the same issues as my old one." Catherine listened with a serious focused facial expression, keeping wide-eye contact with the lady opposite, nodding and "I see"-ing at appropriate moments. She'd called in for a pre-booked 3-month follow-up call with a cafe manager that had purchased a machine from her, only to find her contact had left without warning 3 weeks ago and been replaced by someone who was now giving Catherine a good what-for.

"I'm really sorry you're experiencing some problems here, Jenny, ...."

"It's JANINE."

"My apologies, Janine. Can I ask exactly what's happening with the machine?"

"The grinder seizes up continually. I've spoken to your technical service people about it, at the last place AND here, and their response was "oh, you must be using cheap beans!". Well, that's rubbish, and how dare they! One came out last week to look at it - I'd have thought you'd know that - and he's fixed it for now, but I know it'll happen again. There's a flaw in the design. I won't be buying another one."

Catherine nodded solemnly and kept silent a few seconds. Crap. Nothing in the system about the technical hiccup or service enquiry. Customers - even volatile hard-to-please ones - being accused of causing their own equipment problems. A 2-strikes track record with someone she had no relationship or credibility with. The one time I neglect to re-confirm the appointment. And I go and get her name wrong (I was sure she said Jenny...). Catherine sized up the situation before summarising.

"Janine, I'm sorry you're experiencing this. I can tell you it's really uncommon for this to happen, but that doesn't help you. So the machine is working well now? OK, I'm going to speak with our technical team and get some better answers, and more importantly, solutions to prevent any future issues for you. I'd also like to give you my direct line, and if anything, ANYTHING so much as rattles with the machine, please, let me know immediately and I'll personally make sure things get fixed quickly and with minimal inconvenience to you. Beyond that Janine, is there anything you'd like me to do for you right now?"

Janine looked at Catherine's card. "Well, you're probably not going to take the machine back, so no, nothing. We'll just hope it doesn't happen again. I'm not holding my breath though."

Catherine repeated her offer of help, even suggesting proactive personal follow-up calls on a twice-weekly basis, which Janine declined, and made the most positive good-bye she could.

Stepping into her car, Catherine paused and stared into space a moment. I'll speak to the techs, give them right of reply, before deciding on the next step and who I'll tear a new one. A messy call. They happen. Document, follow-up, game face back on, and move. Call notes done, follow-up steps diarised, Catherine's head shifted to the next call.

## #47 - Chinese whispers

What Catherine's disgruntled client Janine had said to the Carlton Coffee Machines technical service person was "My #\$\$%& machine keeps seizing up! It cost us a fortune, and I want someone out here to fix it now!"

What she had meant was "I'm busy, I'm stressed, and I just want something to work right - it's giving me headaches, costing me time and money, and I really don't want it happening again."

What she wanted was for someone to listen, apologise and move.

What the technical service person had said was "What sort of beans are you using?"

What he was implying was "One reason for grinders seizing up is small stones that occasionally sneak into bags of beans, and its more common with some brands than others".

What the client heard was "It's your fault."

What the technical service person then said to Carlton's customer service person was "One of Catherine's accounts had a problem with their machine. It's sorted. Can you give her the heads-up next time you speak to her?" and handed her a piece of paper with the details.

What the technical service person assumed was that this act was sufficient to transfer their responsibility for documenting the call to someone else.

What the customer service person took it as was a general heads-up and that the technical service person had documented it on the system. And seeing as it was apparently 'sorted', and was presumably on the system for someone as diligent as Catherine to view, passing it on again verbally was probably superfluous for a busy, efficient sales rep.

What happened is it didn't go on the system.

And you know what happened then.

What happened next was up to Catherine. The choose-your-own-adventure options available to her included ranting, finger-pointing, dobbing in, starting a long time-consuming string of emails with cc's and bcc's, ignoring that it ever happened...

Or maybe she could take another path.

## #48 - What the earlybird saw

At 6:10am, Carlton Coffee Machines Melbourne Sales Rep Chris was in bed snoring, his body sweating out the alcohol of a few beers that turned into a belter of a night with his mates.

At 6:10am, Carlton's MD Kevin was perusing his overnight email from the US, grimacing at the latest round of poor sales figures and contemplating what to do about a Seattle-based beans supplier that had just been placed in receivership. A plan was germinating in his head.

At 6:10am, Carlton's National Sales Manager Simone was at the gym, pushing 13 km an hour on the treadmill and thinking about what she was going to fill the plenary session with at the upcoming 1/2 yearly sales team meeting. What would engage, educate and enthuse?

At 6:10am, Carlton's National Marketing Manager Rory was dealing with a screaming 4-month old, letting his wife catch up on some much needed sleep. The mornings were for his family, so all next-day prep work had to be done the night before.

At 6:10am, Carlton's Commercial Machines Product Manager Jack was strapping himself into seat 12D on his Qantas flight home from Perth, a blank notepad and pen in the seat pocket in front of him, ready to start sketching out the framework for a future product promotion. The office in the sky with no distractions.

At 6:10am, Coffee Shop Owner Marco was signing a delivery docket for a crate of milk, readying to open early for a regular 7am breakfast function that a bank management team held. He had to work hard, to diversify, to roll up his sleeves as well as make the big decisions.

At 6:10am, Carlton Customer Service Manager Mary was putting on her coat, ready to walk out the door and drive to the office, an early start necessitated by the fact she had to carry a sick colleague's workload today, and the reports just had to be done.

At 6:10am, Carlton's NSW Rep Mark was surfing the net while munching his Weeties, looking at inspiring TED video clips and checking out search engine terms including "retail marketing best practice" and "top leadership wisdom". He believed in owning his professional development.

At 6:10am, Carlton's hotshot Queensland Sales Rep Catherine was printing out recent purchasing history for the clients she was scheduled to visit that day. And making toast for her kids.

At 6:10am, diverse members of the team at Carlton's closest competitor was doing pretty much the same thing as their rivals.

Maybe even a mite faster.

## #49 - The Huddle

Around the office of the Carlton Coffee Machines boss sat Sales Manager Simone, Marketing Manager Rory, HR Manager Lynne, CFO Heng and Operations Manager Clive. Kevin, Carlton's MD, had recently instituted a 5-minute daily leadership team huddle (in part because he'd been to an Institute of Company Directors course extolling the virtues of such a practice, and in part because the numbers were looking grim and he wanted to be over the plan). They hadn't yet managed *every* morning, but twice weekly was better than nothing.

"Right, US numbers are still down, putting the pressure firmly on us to make this promotion work. Simone, how are your team going rolling it out?" asked Kevin.

"Early numbers are looking good, the adherence to the plan is largely pleasing, there are a couple of slow adopters, but we've got them on track now. Some early wins we weren't expecting, and now my efforts are all about keeping them laser focused and active." Simone knew how Kevin liked his questions answered - to the point, about solutions and accountable.

"Good. Rory, supply's fine?"

"Yes, backorders are pretty much under control, that latest *Grande* shipment arrived this morning, Clive?" The 50-ish Op's manager nodded without smiling.

"Good. We can't have orders and no stock" said Kevin. "Heng, have you got updated DII and debtor day numbers there?" The CFO handed out dashboard highlights showing how fast stock was moving off the shelves and how long clients were taking to pay their bills.

"Days in inventory is down, great, but DSO is creeping up. My team is chasing outstanding invoices today - any help your sales team can offer is appreciated, Simone" said Heng.

"I'm not asking them to chase clients for money, Heng. I need them focused on getting the orders - I can't confuse their roles when it's invoices we most need." Simone had no qualms about being an insulator when others tried to muscle in and second her human resource.

"Fine, fine" said Kevin, "Heng, keep the receivables team on top of the bill chasing. Rory, is your staff situation sorted?" Lynne jumped in on Rory's behalf.

"Kerry's left the building, and I'm building the ad today. We'll release internal first - I think Simone, you have a team member you've let know? OK, then we go to SEEK and go from there. It's a straight replacement of a permanent role, and Kevin, you've OK'd the hire ticket."

"Yes, fine. I'm meeting with the Board Chair this afternoon. Anything else out of the ordinary I need to know about?" Silent headshakes around the room. "OK, thank you, this continues to be a critical time for us, I think you understand the nature of what we're going through. The game is changing, what used to be enough no longer is, but if we keep focused and keep our teams performing at the top of their game, then we'll ride through the challenge. Thank you for your efforts." With a rare gratitude platitude, the team took it they were dismissed. Little can they see the storm ahead, thought Kevin.

## #50 - Prospecting

"Riverside Cafe, this is Paul."

"Hi Paul, it's Jamie from Carlton Coffee Machines, how are you today?"

"Fine thanks. How can I help you?"

"Paul, we've just in the process of launching our brand new restaurant coffee machine - the *Robusta Grande* - and I'm getting in touch with loyal clients that have older Carlton Machine to give you a sneak peek, and to let you know about the launch, loyalty and combination deals we're making available. I wanted to see if I might come by and see you for 10 minutes next week to show you - would that be alright?"

"Uh, Jamie, I'm pretty busy at the moment. Can you just email me some information?"

"Sure I can Paul. Uh, actually, I haven't got the pdf versions just yet, the promotion is so new, but I've got a hard copy I can drop off for you, Paul. Should I drop it to the restaurant?"

"Yes, that's fine."

"No problems, I can do that next week. Paul, just before I go, I see on the system your restaurant purchased a Carlton Machine around 14 years ago. I'm pretty new to the business and we haven't had a chance to meet yet. Can I ask how the machine is performing?"

"Uh, it's pretty good. It's only broken down a couple of times in the time I can remember, minor things I think, your guys serviced it, but it's not been any real problem."

"That's great to hear - that model you have we're very proud of - it's a reliable unit. It's one of the things Carlton knows it has to keep building in all its machines. We know reliability is a big part of why clients buy Carlton. What's so exciting with this new machine is it keeps that reliability, but has taken quantum leaps forward in speed, ease of use and maintenance."

"OK, sounds impressive. Look forward to a brochure. How much are they, out of interest?"

"Sure. The list price on a Grande is \$13,500..... what we're stoked about is that we've been able to structure a short-term launch promotion for loyal Carlton clients with good tradeable machines - like yourself. For a busy restaurant like yours, by bundling in beans business and a trade-in, we can usually structure the deal so that basically the machine costs you *nothing*."

"Nothing?"

"That's right, nothing. Look, I'll drop the brochure by for you to have a look. If you're around on the day and free for 5 minutes, I can quickly show you the numbers. Are you working Tuesday morning next week?"

"No, I work afternoons."

"No problems, I'm demonstrating to another client just around the corner Tuesday afternoon at 2, I'll pop in straight after that if you like, see how you're travelling. I'd love to see an old machine in action too - I can buy you a coffee if you have time!"

A big toe in the door, at least. Who can resist *nothing*, thought Jamie? Well, next to nothing.

## #51 - Interview

"So, Shane, what's this opportunity all about?" Chris leaned back in his chair, a smug half-smile on his face, a man with his tail up.

"Well Chris, as I said on the phone, it's a new FMCG startup, an offshoot of an established multinational, and the product line is gourmet food." Shane, the recruiter from Superforce, went on to share broad details of the sales role he was screening Chris for.

The two men sat in a coffee shop Chris had called on twice in recent weeks. The owner half recognised him, and took 30 seconds to realise he was having a job interview. Chris listened to Shane explain the role, nodding and unconsciously drumming his fingers on the table, taking no notes, trying to crack odd jokes. Each time, Shane smiled politely and continued.

"So Chris, I'm keen to hear about your approach to selling."

"Yep. Sure. I believe in relationships, Shane. They're the key. People buy from people they like. Sell yourself first, and the rest takes care of itself, I say. You've got to have a sharp pencil these days - customers are so price conscious now. And if you know your product, you're halfway there. I make it my business to know my customers, my products, and that's why I'm successful." Carlton's struggling Melbourne Rep had packed his self-confidence.

"Uhh, OK. Can you give me an example of how you've converted a challenging customer?"

"Oh, most of my customers are pretty good. I find that if you focus on building relationships, getting to know people, you can get them to like you, and then it's easier. Assuming they've got money. Some are doing it tough right now, so business is hard. But that's why they hire us, to sell, to build relationships. It's when they haven't got money, then you've just got to say, ah well, and you move on. You get the occasional ones that are impossible to please. Plenty of fish in the sea though, lots of other opportunities. But it's tough out there."

Chris continued to dance around Shane's questions for fifteen minutes, waffling and throwing out clichés and opinions he thought Shane wanted to hear. He couldn't see the notes Shane was scribbling on paper, which was just as well, because the report card got progressively worse. Shane came to his final question. "Chris, if you got the job, and got handed the product list and your new car keys, where would you start?"

"Ahh,..... that's a good question Shane. I'd want some product training - you need to know your product, so I assume there'd be some sort of course for the first week or two. I'd want to see how the other reps go about it - maybe we'd sit down and brainstorm some approaches. Then I'd go and see some existing customers. Wait, this is a new role, isn't it? Well, that's different. Ahh, I'd.... there's a few people I know in the industry, old customers that I'd go and try and convert first. They like me, so there'd be some easy wins there. And, uh, I'd want a customer list, ..." And on Chris rambled.

Shane sat quietly, thinking about the observations his friend had made of Chris's behaviour in the pub. He discreetly finished his report with two letters. NS. "Not Suitable".

## #52 - Itinerary

Carlton Coffee Machines National Sales Manager Simone used the mouse to scroll once more through the agenda she'd built.

### Carlton Sales Team Conference Q4 - "Serve, Sell & Succeed"

#### Day 1 - "Moving Machines"

- 8:30am - Welcome from the MD (Kevin)
- 8:45am - State of the sales nation (Simone)
- 9:15am - Robusta Grande launch promotion update (Rory)
- 9:45am - Commercial machines update (Jack)
- 10:15am - Domestic machines update (TBC)
- 10:30am - Morning tea, networking
- 11:00am - The international experience (Paolo)
- 11:30am - Competitor update (Simone)
- 12:00pm - Barista School - The strategic advantage (Kostya)
- 12:30pm - HR update - looking after our most important resource (Lynne)
- 12:45pm - Warehouse & goods movement protocol (Clive)
- 1:00pm - Lunch
- 2:00pm - Rotational breakout groups (including working afternoon tea) - 45 min each
  - 1 - Simulating challenging sales calls (Simone)
  - 2 - Using the promotional pricing matrix (Jack)
  - 3 - Beans, bundling and the value of Barista school (Rory)
- 4:45pm - VIP Client presentation - Sam Aldoro of Aldoro Cafes
- 5:15pm - Close - networking drinks followed by dinner

Simone had packed the agenda tightly, but there was a lot to get through, and with the global belt tightening, she was probably fortunate Kevin was still letting her hold the two-day conference (she was sure he'd still push her to fit more in each day). I hope I've given them enough time to network, thought Simone. She knew full well that some of the most important moments at these events came during unstructured networking time. Pick your colleagues brains. There'll be more on day 2, when the team gets more heavily into territory planning, she thought.

Simone clicked the mouse button to move to day two's itinerary - "Business Planning - Owning your success". Here's where the rubber will meet the road, she thought. Who's going to be brave enough to chart their course in advance?

## #53 - Call notes

Carlton Coffee Machine's sales wunderkind Catherine sat in the front seat of her car with her laptop open. She clicked the "Account" button in the CRM software, typed in "Bell Hill Hotel", and entered her call notes.

"PNC. 10 mins w Mel (FOH Mgr). Q - machine history. A - 5-7 y.o. La Brazza, 2x/yr p.m., issue re: hw pump ongoing. YM w kids m-teas on rise. Showed R.G. + promo. Like, discuss w Tom (PM). F/U w both 14/11 @2pm; email test. from Glenford 2/11."

What Catherine meant was she'd just visited a Prospective New Client and spent 10 minutes with Mel, the hotel's front-of-house manager. The key question she'd planned and asked was how long the hotel had owned their current coffee machine and how it was performing. She'd been informed it was 5 to 7 years old, that it was a competitor machine from the cheap & cheerful crew at La Brazza Coffee, that they had a twice yearly preventative maintenance service contract, but they had an ongoing issue with the hot water pump breaking down (a common malaise with these machines). Mel had also gone on to offer that the hotel's 'Yummy Mummy' clientele, with their fancy prams and babycinno-wearing offspring, was growing, representing an opportunity for a machine upgrade if it helped them be more efficient (Catherine's logic - the faster you put a babycinno in the darlings hands, the faster you get Mum feeling at ease, ergo spending more).

Catherine had gone on to add in her notes that she'd shown Mel some information about the new *Robusta Grande* machine and the special promotion Carlton was running. Her 'call to action' had been to schedule a follow-up meeting with Mel and her boss Tom, the Premise Manager, on the 14th of November at 2pm. Between now and then (in fact, this very afternoon), Catherine had diarised time to send a thank-you follow-up email that included a testimonial from a happy client at the Glenford Hotel who loved his new *Grande* machine and Catherine's sterling silver service.

One thing I asked and learnt. One new thing I show-and-told. One clear next step we'll take. 3 things - that's all a good CRM note should be, thought Catherine. People try making them too long or aren't sure what to write. It bemused Catherine that so few of her colleagues used Carlton's expensive software system. KISS, my friends. Did they realise it's actually for *them*?

Catherine synched her calendar appointments with her CRM note, closed the laptop, and pulled out her next call plan.



## #54 - Demonstration

"Annnndddd ACTION!"

"Hi folks, I'm Rory, the Marketing Manager at Carlton Coffee Machines. I'm standing in the Barista School training room at Carlton's headquarters in Adelaide, Australia. What we're demonstrating for you today is the pride of our fleet, the new *Robusta Grande* Machine. Now, it's been specifically designed to be the fastest, simplest-to-use commercial coffee machine in the marketplace. Well, sometimes we're pretty good at making these sort of claims in marketing, so rather than take our word for it, we thought we'd make a short Youtube clip for you to prove it!"

A smiling Rory turned away from the camera, which followed his lead and shifted focus to the three coffee machines set up side-by-side on the bench. Behind the *Grande* stood Kostya, Carlton's trainer and Barista-in-residence. Behind two older Carlton machines stood Paolo, Carlton's international marketing liaison, and Carmen, a loyal Carlton client and multiple coffee shop owner Rory had invited in to help them film.

"Cut!" yelled the videographer, a contractor named Darren who Rory sometimes used to make promo videos. "Sorry Rory, I'm going to need to you stand a little more to left of frame, you're blocking the view of Carmen."

"Oh, OK - we can't have that! Carmen, can I just say once more how grateful we are that you could come in to help us with this."

"Oh, a pleasure! It's quite exciting, I've never been on Youtube before!" Carmen was an experienced Barista, a successful businesswoman, and someone Carlton kept close to. Rory's decision to invite her to demonstrate their machine was very strategic.

"Rory, you're pretty confident this'll work, ey?" said Kostya, a half smile on his face. "Be pretty embarrassing if I can't make a cappuccino faster or make it look easier on the *Grande*?"

"Oh, ye of little faith! You know full well this'll work, we've done it a hundred times in rehearsal Kostya. Look at what these live demo's have done for the Blendtec guy!" Rory was inspired by the "Will it blend?" series on Youtube. "It's just a shame we haven't got the latest competitor company machines to put next to the *Grande*. I'm working on Kevin to see what we can do about that. Our spec's say we'd smash them. I'd love to prove it and get it viral."

Darren rechecked the ambient light with his meter. "OK, from the top. Keep it friendly and real Rory - Youtube doesn't love slick polished commercials. You want this to be simple, relatable and real. Good to go? OK. Aaaaannnnnd ACTION!"

## #55 - Real life

The 70-ish gentleman stood at the counter of the coffee shop *Plunge* and watched the 20-something staff member poke and flick the shiny new coffee machine. The gentleman whistled and made friendly small talk.

"Oooh, that's a flash looking machine. It looks like you need a license to drive it!"

"Yes, we just got this one a few weeks ago." The younger man wasn't all that interested in talking. His shift was nearly over, and he still had a stock count to do.

"Now, what sort of machine is that? It looks like a Rolls Royce!"

"Uhhhh, I forget what brand it is....." He looked on the side of the machine. "Carlton. Like the football team."

The old man whistled again. "Does it wash the dishes as well?" he asked. The young man mentally groaned.

"No, we still have to do that. It's pretty fancy though." Truth be told, the young man didn't really know how the new machine differed from the old machine, other than it had a few more buttons he didn't yet know how to use. Apparently, the sales rep was supposed to come in and show them how to use the machine properly. The young man wasn't sure when. His manager was also supposed to go to a training course, who knew when. It's just a coffee machine, the younger man thought. Why do you need a training course? In the meantime, he'd figured out the basics by playing around. Won't break it, and the coffees were coming out fine, so who cared?

"There you are Sir. That's \$3.50." Another whistle, as the old man rooted around in the coin pouch of his wallet.

"My, the cost of a cup of coffee seems to go up and up and up, doesn't it? I remember when it was two bob for a cup."

"Yes, inflation", cheekily adding "we have to pay for these fancy new machines too."

The man tsk, tsk-ed like Skippy, thanked the young man and took his coffee to a table.

Hmmph, thought the younger man. Still have to clean the poxy thing, and refill the beans, and top up the milk, and get rid of the grinds. He wiped the milk spout. For what this thing must be worth - a figure the young man had no idea about - it's not *that* fancy. Give me an old jobbie and pay me the difference, he thought. Coffee'll be the same.

The young man headed out the back to finish his stock count.

## #56 - Journal Club

"So, would you recommend we read it, Jamie?" asked Simone.

"Yeah, it's not bad, there's some good points about dealing with common objections, and some simple ways you can get your foot in the door. It's pretty American, a bit ra-ra, but it's an enjoyable read and a good refresher of fundamental sales principles" Jamie offered down the conference line. The book he was referring to was Brian Tracy's classic *Advanced Selling Strategies*.

The Carlton Coffee Machines Australian sales team were having their fortnightly "Coffee Conversations" journal club phone hook-up. It was an initiative Simone had borrowed from a sales management colleague who worked in the medical sales industry. It echoed a continuous learning and information sharing methodology that junior doctors in hospitals use, where a group regularly meets and take turns to summarise and critically review a clinical paper or journal in front of their peers. By sharing the reading and reviewing responsibilities around the group, it meant busy people could keep their finger on the pulse of relevant new information or revise the classics while not having to read or re-read every publication themselves. Plus, you got different perspectives from the ones you might take from the same material.

"Great stuff Jamie, thank you. I first read this years ago, it had a big impact on the way I thought about the nature of selling, and in particular, how selling is such a self-driven, personally accountable role... that is, if you want to be successful." said Simone. "If anyone wants a copy, let me know by close of business today and I'll order them in bulk from Amazon. I challenge all of you to take the 3 key learnings Jamie shared, and consider how you can implement them for the client meetings you've got planned today. Right, who's up next fortnight?"

"I am" said Chris meekly.

"OK, what are you going to review for us, Chris?"

"Uhhh, I thought I'd do something a little different. I thought I'd give a quick overview of my top 5 blogs that I think are relevant to our industry."

"Oh.....what a fantastic approach!" said Simone. For the second time in a week, Chris had surprised her. "Can't wait to hear! Social media is becoming an increasingly important information source and learning tool - great thinking Chris! OK everyone, have a great day!"

Full of surprises. Still destined to be fired, but keeping me guessing, thought Simone.

## #57 - The answer is questions

Sufficiently inspired by her sales team's contributions to the "Coffee Conversations" professional book club she'd just overseen, Carlton Coffee Machines National Sales Manager Simone decided to bite her own bullet and act on a task that had spent too long on her 'nice-to-do' list. She started typing.

**"Questions before suggestions** - powerful questions to ask prospective Carlton clients."

Not only did Simone possess a wealth of sales experience and a track record of sales success, her national team leadership role afforded her the privilege of observing different questioning approaches used by her team members. To her knowledge, none of her team had ever written down a list of sales questions that could be pre-planned for different sales calls. All would need some personal modification to suit the style of the sales rep and the situation, but would it hurt to have the bones of a list - maybe one the team could keep contributing to - as a ready reckoner?

"Hi team! What follows are a handful of different question ideas you might consider before each prospecting and sales call you go into. Great questions unearth valuable information. They build confidence and trust. They give you answers that tell you how to proceed. And they provoke thought. Here's a few - would love your additions to this master list! Cheers, Simone."

Simone went on to create a list of questions, from fact checking to soliciting opinions to demonstrating understanding to showcasing preparedness. She built questions to start conversations in the right way, to segue between sales process steps, to redirect a conversation to what was really important, to gauge the level of intent or weighting a client put on a certain point, and ultimately, to ask for the business. She put in closed questions, open questions, goal-clarifying questions and questions to pinpoint client challenges. Details questions, what-happens-if-you-do-nothing questions, even referral-soliciting questions. There would never again be any excuse for a team member to not have a good question idea up their sleeve, Simone thought. Heck, even 15-year-old checkout operators at McDonalds know how to ask a good upsizing question.

Simone wrapped up her list in under 30 minutes. How good does that feel, she thought. To do something important over urgent. She clicked send, turned her phone back on, and resumed the reactive.

## #58 - Transitioning mindsets

"So, Mark, why do you want to work in marketing?" Carlton National Marketing Manager Rory sat in Carlton's Adelaide Boardroom before a Polycom camera. On the TV screen was Mark, Carlton's NSW representative, sitting in the North Sydney conference room of a recruitment company Carlton sometimes used.

"Well, it's what I'm trained in - it's my first passion. I love the idea of taking a product, a brand, and growing it with clever campaigns and creative, innovative ideas. There's a new world opening up in social media that I'm savvy about, and I think there's great opportunities for Carlton to tap into it more." Rory made notes as Mark spoke and smiled to himself.

"Mark, the reality is that much of the role of product manager is chasing up things, dealing with details, planning and tracking and making sure we have boxes on the shelves for the sales team to sell. It's not as romantic as creating new strategy or ads each day. How do you think you'd deal with that?" Rory didn't want to dampen Mark's enthusiasm, but he needed to know if Mark could turn sausages as well as make them sizzle.

"Sure, I understand. I've spent the last 18 months in my sales role watching and picking the brains of some of the marketing team members. I think I've demonstrated that I've got strong organisational skills, good follow-up skills, and through the local marketing initiatives, that I pay attention to detail. My aim in this marketing role would be to get a system in place where I can efficiently and effectively manage both the logistics of the role and keep me free for a period each day to work on future business growth initiatives." My giddy aunt, the confidence of these Gen Y'ers, thought Rory.

"OK. What if I said to you that the marketing plan for the next 12 months for this retail portfolio role had already been set, and that my primary need for you would be just to execute the plan. How would you feel about that, knowing that it'll be a while before you get your chance to put your creative thumbprints on the brand?"

Mark considered silently for a moment before answering.

"I believe that the first 12 months in the role would prove a great opportunity not only to learn the mechanics of the product sourcing and delivery responsibilities I'd have, and to take on as much mentoring and guidance as I could get from talking to others around me, but I'd also invest much of the time building my relationships with the sales team and suppliers. If I focus on becoming an interested, helpful, responsive partner to the sales team, and make myself an 'easy to deal with' client of suppliers, then I think I'll have a head start by the time the opportunity comes to start developing new campaigns and brand-building initiatives."

He got the job.

## #59 - Awkward

"Good Morning, Carlton Coffee Machines, this is Mary!"

"Hi Mary, it's Mike from Davey's Whitegoods, how are you?"

"I'm really well thanks Mike! What can I do for you?"

"Mary, we've got some old *Bella* stock on the shelf here that hasn't moved - we purchased it nearly 12 months ago now - and we need to return it for a credit. It's not going to move, and we'll need to get some new models in. Carlton, of course."

"OK Mike, did you have those machines on consignment?"

"No, we bought them in, an expensive purchase, but they're not moving the way the rep suggested they would, so we need a credit."

"I see. Mike, I'm just bringing up your details on the computer." Red flags. "Mike, I can see here that you're on a 60 day account, and that there's an outstanding payment sitting at 120 days now. Have you received notification that you're on credit hold?"

"Uhh, I'd have to check with Sonia, she's not in now. I'm sure we're paid up. We're a good customer of yours Mary. We need this credit organised immediately. "

"I understand. It looks on the system like you bought the *Bella* stock back in 2008 Mike, as part of a clearance sale on the old line."

"No, I'm sure it wasn't that long ago. We go through a lot of your gear."

"I understand. Mike, what I'll have to do is speak with our finance department and see what the process is - can I have someone come back to you this afternoon Mike?"

"Uhh, yeah, if I'm not in, leave a message. I've got it boxed up, and I need the credit arranged this week. I've got your competitors banging down my door for machine business, and if Carlton wants my continued business, they'll look after me. Tell Chris he needs to look after me."

"OK Mike, I'll get onto this right away, and someone will come back to you quickly."

Mary tapped out an email to finance and cc'd Chris. A client to fire, if ever there was one.

## #60 - Remembering

"I'm just having one of those days" said Chris. It was 1pm. His morning had been a series of not-interested prospecting calls, and he'd just met with a disgruntled customer who'd heard about the new promotion price on Carlton machines and grizzled he'd obviously paid too much for the one he bought 6 months ago. Now on the car hands-free, Carlton's problem child Melbourne Sales Rep was dumping on Catherine, his Brisbane shining star counterpart.

"Well, why did they buy from you in the first place, Chris?"

"Oh, don't worry about them. The day will get better." He didn't sound like he believed it.

"No, this is important. Stop. Think about it a moment. Remember. Why did they buy?"

"Uhhh, they needed it."

"Why?"

"Well, their old one was breaking down all the time, and service was starting costing a fortune, and it was a pain in the bum having to get it fixed, and all the downtime..."

"Right. But they could have bought from anyone. Why did they buy from you?"

Chris sat and thought for a moment. "Well, I... I'd been calling on them for a while, staying in touch. They had a really old Carlton machine that one of my predecessors had sold them, and they had a pretty good run with it before it got old and started failing. Plus I think they liked me - I always ask about their family, how business is, and I always buy coffee there."

"So someone before you did some hard work. Then you took the baton and kept going. They trust you - you are Carlton, they like you, and they like the product because it helps them with their business. Saves them money. Makes them money. Less breakdowns means more uptime to sell coffee. Peace of mind. Knowing the machines work and last. They know you, you're their trusted partner, because you stay in touch and try helping them. It sounds like these people have a long term partnership with Carlton Chris, and you and your predecessors are a big part of the reason for it. It sounds like your business with them will survive a little short-term knee-jerk grizzle. Are they still happy with the machine?"

"Well, yes."

"And your service?"

"Yeah, they like me, and I'm pretty regular."

"So Princess, get over it. If all your sales troubles are that small, you've got a pretty good thing going on. You're doing some great work Chris - this client believes it - and now you've got an amazing chance to showcase it to the next client or prospect you deal with. Remember, you're Chris - Chris - and you work for Carlton. Carlton."

Geez, thought Chris, feeling his neck hairs stand up. Why can't she be my boss?

## #61 - Social Media

The weekly spitballing meeting in Carlton Coffee Machines marketing department was underway. Newbie Mark, who'd just joined from sales and now had the reins on the domestic machines portfolio via the retail channel, was pitching a concept to his new boss and colleagues.

"So, you've seen those group buying sites like Scoopon, right? Well, I was thinking, how about we actually created a "Carlton Coffee Deal of the Day", where each day we advertised - maybe via Twitter, and our Facebook page, and a subscription email - one coffee shop in each city that had a mega-special on a cup of Carlton coffee. So, we support it and advertise it, and we just look after those coffee shops that are regular Carlton clients - maybe it's only for those that buy our beans - and we tell them that for any clients who cite the special between, oh, I don't know, 7 and 11am, they sell a cup of Carlton coffee to them for half price. And we, as a loyalty initiative for our coffee shop clients, either part or fully fund the difference in price. So they get increased custom, we pour our promotional spend into those who're already growing our brand, and we position ourselves as a relevant, tech-savvy name in coffee?" Mark's colleagues sat around nodding intently, eyes wide open, lips pursed with heads slightly tilted.

"Mmmm. Do we have much data on how effective these types of social media promotions are Mark?" It was Mark's new boss, Rory. He prided himself in being open-minded, but still wasn't convinced about the social media phenomenon and its tangible impact on a business like Carlton.

"Well, we'd have to get some more data I guess, but think about it. People who tweet live in cities and drink coffee. I imagine they wouldn't travel across the city to save \$2 a cup, but if they're nearby..."

"Maybe we need to make it 'free' to anyone that whispers the deal to the barista, and shows them their smartphone screen showing the tweet or email. Maybe we just make it for an hour a day? Really exclusive, exciting for those in the know." Jack, Carlton's commercial machines product manager, had some understanding of this brave new world. "I belong to a wine selling 'club' if you can call it that - it's called Vinomofu - and they do a variation of this, tweeting a 1/2 price deal of the day. Going great guns. I spend a fortune with them."

Paolo, Carlton's international marketing liaison, chimed in. "I think if we pay the full amount, the coffee shops would be all over it. We'd need a dedicated social media resource. I've also been thinking that we could offer an envelope of "Carlton dollars" with every domestic machine sold, that they could cash in at any cafe that sold our coffee, and we reimburse the shops."

"Mmmm, I've been thinking about that too Paolo, I think it's a great idea. Let's stick with Mark's idea for now. Mark, how will you cost this up... resource it...and how will we sell it? The sales team need to stay focused on the current promotion?"

The spitballs started morphing into cold hard realities and roadblocks.



## #62 - The formula

Carlton Coffee Machines National Sales Manager Simone sat quietly and waited to see if Fiona would add anything to her answer. 3, 4, 5 seconds of silence. I like that, thought Simone. She doesn't feel compelled to fill the quiet void.

Simone had spent the morning interviewing 3 candidates to take the place of Mark, her Sydney sales rep who'd transferred into marketing. Fiona was the standout. The other two looked flash on paper, but had no depth to their answers and their desperation to get the job was off-putting. Keen, good. Ravidly enthusiastic, scary.

"Fiona, if you got this role, you'd be all by yourself here in Sydney. We have a Central Coast rep, who you'd see occasionally, but aside from the technicians and some warehousing staff, you're it here. I'm in Adelaide, Mark's relocating there, and effectively, this business would be yours to run quite autonomously. How would you plan to do it?"

"I've thought a lot about that in the last few days. I have to say, it really excites me. Something I learnt in my previous TM role, where I had lost of autonomy, was that you have to keep a simple territory plan working. I like planning. I'm not really a morning person - it takes me a coffee to get going! So what I've always done is, I map out my day the night before, and then I try sticking to my call run each day. How do I describe this..... I've developed a set of rules I've found works for me."

"Rules? How do you mean?"

"Well, I think there's a simple formula for running a territory. An old boss taught me this. So I have a target - so my sales target, or maybe there's a promotion on, or there's a list of high potential clients I'm aiming to sell to by a certain time. Then what I do is prioritise where I need to spend my time to hit the target, and I start with the biggest potential clients - often I find they're already big clients - I find existing clients are a good place to start. Then I build a 12 month plan for them, figuring out what they need, want, how I can help them, and I build a regular call schedule to see them. I'll plan with them, I do that for the key clients, and I invest less and less time as the size of the opportunity shrinks. Then I build myself a pre-call plan for each meeting - I have a little template I've developed - and I go in and start asking lots of questions of people, learning more about them, you know? All the while, I'm doing my homework to grow my product and market knowledge, a little each day. Then, I split my territory into geographic segments, and plan my activities to keep calls bunched, avoid too much downtime between calls. And then I get busy."

"Get busy?"

"Getting out and implementing the plan. Seeing people. Just moving. I find if you plan and have lots of conversations, the results tend to come. Because I don't have a team here with me, I've always found to stave off the loneliness that comes with the job, you're best served by being with clients as much as you can. That's how my best sales have come about."

Not that hard, is it, thought Simone. I'm going to reference check this one.

## #63 - The rot

The Australian leadership team of Carlton Coffee Machines sat still and silent. MD Kevin continued.

"So, the Board's instructed me to begin the restructuring process. America continues to slide, our European sales are now taking the hit in line with their economy, and despite a promising start to the new machines promotion locally, the sales stagnation after the early adopter spike means we're unlikely to hit the target we set for this initiative. Combined with the fact that a number of our larger retail channel clients are either going under or are pushing so hard on price that the partnerships are becoming unprofitable - Rory, I see in the paper this morning that Davey's Whitegoods just went into receivership? Yes, well, what all of these things mean is that something has to give. I'm initiating a process to close down our remaining manufacturing capabilities over the next 4 months."

The group couldn't have been stiller.

"Our greatest equity lies in our brand presence and client relationships. It's where our greatest opportunity lies, not sadly in making widgets. Despite where we've come from as a manufacturer, today we are first and foremost a sales organisation. Now, through outsourcing the manufacture of our machines - still branded 'Carlton' - to offshore manufacturers geared for scale and with cheaper workforces - and, who I think you'll agree, have now proven themselves more than capable of handling both quality and demand - it's vital that we strip unsustainable costs out of the business to enable a return to profit, even in difficult economic times. I've got a very clear mandate here - shore up the future of this organisation as quickly as possible - and make sure we continue to be an employer, a preferred supplier, and a name to be around for generations to come."

The silence hung a moment.

"Shit" said Rory.

"Wow" said Simone.

"Yes, I know. Lynne and I have already mapped out how we'll announce and roll this process out with the staff. Lynne, I'll let you speak to that in a moment. I'll then talk to you each one on one about the priorities for your teams - suffice to say nothing leaves this room yet. But you need to know - this is a long time coming, it's not been done lightly, and while a lot of people will hurt from this in the short term, it is the only decision we - I - could make to ensure our remarkable company has a future."

Approximately one point five seconds after Kevin finished speaking the word 'future', the mind of every individual in the room turned to how the decision would impact them and their team.

## #64 - Mental checklists

Carlton Coffee Machines MD Kevin sat behind closed doors with his soon-to-be-redundant Operations Manager Clive.

"Clive, we need you in a different capacity. An overseer of the quality standards that we'll need our 3rd-party manufacturers to follow. They're pretty competent, but they'll need guiding and training and governance. That's where I'll need you."

Behind her closed office door, Carlton's National Sales Manager Simone stared out the window and formulated a mental checklist. "Things to do after speaking to Kevin". 1. Draft a communication message to use with the team once the formal company-wide announcement has been made. 2. Book the team in for 1-on-1 conversations - ? build a checklist for conversations? 3. Call the event management company and let them know we're postponing the sales conference. 4. Speak to Rory re: Mark and supply vs orders in system and forecasts. 5. Let Mark know his role will be hybrid sales and marketing for a few months while the new head count freeze remains in place. 6. .... update my CV?

Clive, still shell-shocked by the news he was about to lose his manufacturing team, spoke up.

"But that sounds like an awful lot of travel, Kevin. You know I've got a young family - one of the things I've always loved about this role is it allows me to stay put where my roots are. These OEM's are in India, and I've seen how they work. They do a good job, but there's a lot of support needed."

Behind his closed office door, Carlton's National Marketing Manager Rory stared at the Carlton poster on his wall and formulated a mental checklist. "Things to do after speaking with Kevin". 1. Speak with Clive - what can I do to help? 2. Bring the team in for a chat - implications to current marketing plans, then future plans. 3. Speak with Simone re: Mark - need him more than ever in marketing. 4. Speak with Lynne - internal marketing program, renew staff engagement? 5. Call PR company - it'll get out fast, what to do? (scratch that, make this #1). 6. .... CV?

Kevin nodded solemnly and leant towards Clive.

"I understand Clive. It will mean more travel, and I know your family is important to you. I hope you'll take this opportunity. One of the first things I'd need you to do is map out and cost a travel and support schedule for the Indian crew. I believe you've got so much to offer this role Clive, and hope you'll take it."

But if you don't, thought Kevin, I'm now mentally preparing your goodbye speech and moving onto your 2IC. And I need to know in the next 5 minutes.

## #65 - Expectations Management

"Hello, Chris speaking."

"Chris, it's Marco.... listen, can you swing by here this afternoon and spend some time, I've got a new staff member coming on at 3, and I want you to show them how to use the new machine."

"Uh, sure Marco. Just let me pull over and look in my diary - I've got a feeling I've got a few meetings booked."

This call had become an almost daily occurrence. Since cafe owner Marco had taken delivery of a new *Carlton Robusta Grande* machine from him several weeks ago, Chris had been at his beck and call. Marco had made it very clear that with his not-insignificant purchase came the expectation that Chris would nurse him through the new purchase learning curve. That included staff training (free of course), troubleshooting the simple stuff (also free), and just generally being on hand to deal with questions. At no extra charge.

"Uhh, I've got a 3pm booked already Marco. And a 4."

"OK, can you get here at 5? We'll get her through to then. She'll be running the shop from her own for a period after 7, so as long as you can get in before then. Thanks Chris, I've got to go, I'll see you then." Marco hung up.

Chris sighed. The sale had been a good one, and the timing couldn't have been better - his boss, who'd been performance managing him for the past month, had been co-travelling with him that day, and Chris had weaved some magic he'd forgotten he possessed. He'd even convinced Marco to convert to Carlton's beans - a deal that had subsequently fallen over (Marco just didn't like the taste of them). Now, he found himself paying the price for offering to bend over in every direction to win the business. I've got to train myself out of there, thought Chris. The size of the purchase is way out of proportion to the amount of after-sales support I'm offering, and it's costing me opportunities. And since that recruiter isn't returning my calls, I need to make this gig work.

Chris closed his diary, pulled away from the curve and continued to his next prospecting call.

## #66 - Transition

"Rory, Catherine's got this client on the hook for seven machines - SEVEN - and you're telling me we can't get her the product we've promised them? They'll spit! No, scratch that, they'll cancel the order and go over the road. They open in 3 weeks! How will they run a shopping centre without coffee machines?!" Simone was giving it to her marketing counterpart with both barrels.

"Sim, I understand. What do you want me to do? If this was Clive and his team, I could go down to the factory and lean on them. Now these machines are ex-India. Clive's not here anymore, and Kerryn's got no idea what she's doing yet. I think the Indians are trying really hard, but until they're fully familiar with all our specs, they're going to be slow. And we don't have any more in the warehouse."

It was now three weeks since Carlton Coffee Machines had announced it was closing its last remaining manufacturing lines and outsourcing production to two overseas companies. The party line was one of rationalisation, economies of scale, and focusing efforts on Carlton's current core competencies - sales and distribution.

The manufacturing staff who'd been let go took it badly. Despite the HR manager's best efforts in engaging a recruiting firm and transition specialist, several downed tools and left immediately. Those that stayed were snowed under making any remaining orders in the system (many were also on go-slow). The Operations Manager Clive had decided that the alternate role he'd been offered - an 'international liaison' with the 3rd party manufacturers - wouldn't suit his lifestyle, and his 2IC Kerryn had taken the challenge. But she was green, as were the Indian manufacturers. They'd built for Carlton machines for several years, but the speed of the transition to make the remaining machines had taken them by surprise and it would likely be a few months before all the wrinkles were ironed out. All of which left Simone - more importantly, Catherine - more importantly, Catherine's customer - in the lurch. 7 new machines needed in 3 weeks for a shopping centre opening, and no apparent way to have them there. So Simone, National Sales Manager with an impressive track record but remarkably terse manner in these situations, was venting again.

"Gah!! Kevin promised there'd be little interruption to normal transmission! How can I empower and support a team to sell when I've got no confidence that we can deliver!"

"I don't know what to tell you Sim. I'll get onto Pradeep again and I'll rattle Kerryn's cage. I'm over there in a week - if there's no joy by then, I'll see what I can do. But you need to prepare Catherine for the fact we might have to let this one go."

"Pigs arse. I'm not letting her tell them to go to the competitor. I'm calling Kerryn again. Then I'm getting Kevin involved. If we're a sales company now, we damn well better be able to sell!"

Good luck sister, thought Rory. Might want to modulate your approach and remember 'sell over tell'.

## #67 - Upskilling

Carlton Coffee Machines Marketing Manager Rory and Kostya, Carlton's Barista-in-residence, sat in the company's head office tea room (or 'cafe' to visitors). Kostya sipped a long macch, Rory a short black.

"We've got to enhance our point of difference, Kostya. The organisation's hurting with this restructure, and if we're not careful, clients will start seeing it, and then it's like blood in shark-filled water. I think our challenge is to help the sales team take the business to a whole new level. To change the playing field for our competitors, take it to a place they can't compete." Rory trusted Kostya. He was a rough diamond, but smart as a whip.

"Yeh. This Barista school has worked well, but ut's ixpensive to run, and you can only see so many people. What uf we took the idea out of head office here, and had the team run them with clients? And not just for new clients, but as a value-added service option repeated once a year? And you build the cost into the front end of the machines?"

"I think you're right. We've talked about it before, but now we need to clearly demonstrate that our sales team are a genuine strategic advantage. We don't manufacture, we sell and support. So we better be good at it."

"I can run the Barista training with them all - shoulda done it a long time ago. If you like, we could set up ongoing Barista coaching with them, refresher stuff. The time and resource I normally put into running the courses here could go to training & supporting each rep, eh? I don't mind travelling."

"I like it. We'll have to get Simone in on this, and check that Kevin's OK with the redirected resource. Makes good sense. Create and support a team of sellers that train. Or trainers that sell."

"Mate, you don't have to be able to sell uf you're good at training. It's like what I tell the cafe owners in Barista school, that all you really need to do is 3 things for clients. Save 'em time. Give 'em value for money. And offer them peace-of-mind by showing that they made a good choice. If your training does those 3 things? Piece of cake, man. People buy in."

"Mmmm." Rory had mentally stepped ahead. "We'll have to put them all through "Train the Trainer" first. Can you do that? We're an RTO, right?"

The two marketing team members nuttud out some details before selling the idea on.

## #68 - Opportunity

When the reactive glass-half-empty whiners begin their woe-betide-us victim bleats, the rare few who can combine vision, opportunity identification and discipline smile to themselves and begin making lemonade. This philosophy had occupied the head of Carlton Coffee Machines most successful sales rep these past few days.

Catherine sat at her home office desk. It was 5:15am. She'd set the alarm particularly early today. She was going to make the most of the opportunity the company restructure and staff unsettlement had afforded. Most of her sales peers were phoning one another continually and speaking fearfully about whether they'd be next and did the others know the name of a good recruiter and what would happen to those who'd been let go. Catherine, sympathetic though she was, saw the opportunity. She took out a piece of paper and, referring to the spreadsheet glowing on her laptop screen, started writing the names of her biggest purchasers over the past 3 years. Below those names, she wrote the names of 50 high-potential prospects she'd identified throughout the past 3 months. To the right of every name on the list, she wrote a letter - r, o, a or d.

R meant she'd go and pointedly ask the happy client for a referral or testimonial - a powerful peer-to-peer sales tool as well as a subtle way of galvanising the referrers own satisfaction with Catherine's services.

O meant she'd go in and sell the offer, the *Robusta Grande* launch deal that had been extended a month longer to maximise sales in a depressed time. And by 'sell' the offer, she didn't mean show it, discuss it, put it on the table.... she meant sell it.

A meant she'd offer the business a free 42-point audit and recommendations report for their entire coffee making and service system. No-one had ever taken it to that extent before, and damned if she was going to wait for marketing to formalise it. She'd created a checklist, and before the month was out, her aim was to run this audit with at least 20 coffee shops, hotels, restaurants and businesses. If I can't get myself at least 5 decent sales from that, Catherine thought.

D meant delight. A special bonus thank you for the most loyal of loyal. Nothing expensive (she knew she couldn't get much through the expense system now). A hand-written thank-you card, a free bonus training session for staff, taking the client for a coffee in another premise (doubling as a market research project). Secure future loyalty with dynabolts.

The ROAD to turbo-charged sales results, thought Catherine. While everyone else is fretting, I'm going ninja. I'm going to show why I'll be the last one in the building should the rot continue. At very least, I go down swinging and make myself an unbackable favourite for any future opportunities I put my hand up for. And clients still need us, and they're still buying, so I can make good coin. And I LOVE IT.

Catherine smiled as she began transferring her master list into distinct action steps in distinct time homes in her diary.

## #69 - The party line

"Good afternoon, Carlton Coffee Machines, this is Mary!"

"Hi Mary, it's Phillippe from The Judd Hotel in Melbourne."

"Hello Phillippe, how can I help you today?"

"I need to get onto your sales representative Chris. He left me some information about a new coffee machine, and I want to speak to him about it, but I seem to have misplaced his card. Or if there's someone in your office I could ask some questions of, maybe that's easier?"

"No problems at all Phillippe. Chris is absolutely the right person to speak to, he'll have the product and pricing knowledge I'm sure you'll be after. Let me save you another call, I'll put you through right now...."

".... Phillippe, it's diverting through to Chris' message bank just now, so he's probably in another meeting. Can I get your number, then I'll have Chris call you as soon as he's free?"

"Sure." Phillippe recited his number. "It was a while ago we last spoke, I thought he was coming back to me with more information. But no mind. Can you have him call me in the next day please?"

"Certainly. Is there anything else I can help you with today Phillippe?"

"No, thanks Mary. Oh, one thing. I heard the other day that you guys have stopped making coffee machines and let half of your workforce go, is that right?"

Mary's eyes went to the laminated card next to her phone.

"Well, we have made some changes to the business that will let us provide faster and more comprehensive help to our clients. You're right, we have partnered with some companies that are global specialists in high end machine manufacture. They're global production experts, with the expertise and the most amazing manufacturing technology, and they'll help us make our machines to ever-higher standards while keeping the prices at a level our customers will appreciate. It means we can now fully focus our efforts on new machine design as well as looking after our customers, rather than running a factory. The machines will be as good as they've always been, and our customer and technical support will now be better than ever, Phillippe."

"Oh. OK. Well, if you could have Chris call me."



## #70 - Why you're here

Simone, Carlton's National Sales Manager, and Rory, the Marketing Manager had been at loggerheads ever since the restructure that had seen Carlton's remaining manufacturing capabilities shut down. An immediate headcount freeze had meant Simone hadn't been able to get final approval to hire Fiona, an outstanding candidate to take the place of Mark, Carlton's Sydney-based sales rep who was part-way into his transition into the marketing team. Rory had insisted that Mark was needed to fill the vacancy in his team to stimulate growth in their domestic machines retail channel (which was flagging) and ensure Simone's sales team had product they could sell. Simone's argument (which she was convinced was more powerful) was that if they didn't have salespeople out there selling, there was no need to bring product in to sit on warehouse shelves.

"Rory, I understand you're a person down and Mark had been confirmed in this role. But until this headcount freeze lifts - and you know I'm in Kevin's ear about that - I can't be without a salesperson!"

"Sim, if we don't get this retail sector moving a bit quicker, we're in deep strife. It's a promotional campaign sensitive space, and I need Mark to get the promotions together and organise product to get into the stores immediately! His efforts will be a catalyst to help your sales team sell more. Plus, he's already moved here! His stuff is in transit, and even if I wanted to - which I don't - I don't know how you propose we'd back out of the contract!"

"I'm not saying he won't join you in marketing. He will. All I'm saying is that we need salespeople in the field right now. Call it 'seconding him' to where our area of most immediate need is. What's our organisation here to do, Rory? What is our overarching goal?"

"To make profit. And the only way we can do that is to have product in ...."

"YES! PROFIT! And how do we get it?..... By SELLING. That's the only reason we're here - to sell. That's the only reason marketing even exists - to help us SELL more. Nothing more, nothing less. Cash from sales pays for the fun to continue. So we must - must - gear our efforts to maximise sales...."

"But they're redundant if they don't have anything to sell or prospective clients wanting to talk to them...."

And one of the oldest chicken-and-egg arguments in business continued.

## #71 - The lie

Jamie, Carlton Coffee Machines Perth sales rep, stood at the restaurant counter with Paul, Manager of the Riverside Cafe. Jamie had been trying to tee up a conversation with Paul for weeks and had finally managed to pin him down for a chat.

"So Jamie, you said on the phone that you get the new machine in here for me for nothing - **free** - is that right?" Jamie had hooked Paul's interest (and a hard-to-get appointment) by intimating that a promotional offer, trade-in and beans bundling deal meant that replacing his old machine for a new one would not incur any out-of-pocket costs.

"Yes, as I said, quite often we're able bring your capital outlay down to little or nothing by bundling in your beans business, trading in your old machine, and putting in place a finance program. If you look at what you might reasonably expect to spend on the maintenance of a machine as old as yours over the next 5 years, you'll see that..." Jamie went on to compare projected monthly maintenance costs for Riverside's old machine against finance payments on a 5-year chattel mortgage with a 20% residual. "What that means is you could have the new machine in here for exactly what you would have been paying to keep the old machine running for another 5 years."

"Hang on. You said it would cost nothing. Yet I see a balloon payment at the end there. And the beans prices you're showing me are obviously inflated to make the machine price lower."

"Well, we can structure it this way so you're not paying financing interest on a higher capital price."

"So I've got interest to pay as well. So we've gone from a machine that you told me on the phone would cost me nothing, to saying it'll actually cost me the equivalent of 'projected' repair costs on a machine that's still working fine, to saying I'll have a balloon repayment, and that I pay more every week for beans to cover the shortfall." Paul's mother hadn't raised a fool. "You've lied to me, Jamie."

"Well, I..... of course, nothing's ever for nothing. But the way we can structure it means..."

Paul shook his head and stepped back.

"I'm sure that's a good deal. And the economics no doubt make sense. But you've tried to suck me in here Jamie. I've been a Carlton customer for a long time. I deserve better than being lied to. I've worked in a lot of sales roles in my life Jamie, and I know a sell job. I don't appreciate someone trying to sneak one by me. We're done here."

## #72 - Resolution

Jamie had never thought of it as lying.

Standing outside the Riverside Cafe, having been stung by the slap of a client calling him a liar, Carlton Coffee Machines Perth sales rep tried to suppress his anger and analyse where it had gone wrong. Hadn't he offered the client an amazing opportunity? Sure, he'd had to sugar-coat the opening salvo a little to guarantee the appointment, but...

Years from now, after he'd gone on to forge a successful sales and sales management career in the coffee and shop fitting industries, Jamie would often reflect on this call-gone-wrong. In field visits or during performance reviews with the reps under his tutelage, he'd relate back the lessons he'd taken from this call. About how what you say, what you mean and what customers hear aren't always the same thing. About the importance of not overstating what you can do for clients in your preliminary conversations - in *any* conversation. About setting realistic expectations and understanding customer perceptions and never, ever telling anything but the truth, the whole truth and nothing but the truth. Most of all though, about doing whatever you need to do to avoid the feeling that Jamie had felt all those years earlier. The feeling you get when a loyal client looks at you like you just stole their lunch money - the look that tells you they're feeling hurt and betrayed by you. Disappointed in you. As a result of that day, he'd resolved to never, ever deliberately do anything that can earn you that feeling. Because from this one call, he came to appreciate that the feeling of breaking a trust lasts much longer than the fleeting joy that comes from artfully massaging someone into buying something they may or may not have needed.

All these lessons would take a while to sink in and make themselves apparent to Jamie though. Right now, as he stood on the footpath in the warm late-morning sun, all he felt was emptiness and anger. He walked on to his car, muttering about how stupid some people were and they didn't deserve the deal he was offering.

## #73 - Clingy

"Thank you Chris, I appreciate you helping Lanie. I think she'll be very good, just needs a bit of help in the early days. Could I get you to pop back in on Tuesday for 10 minutes or so, just check how she's getting on and do a little troubleshooting with her please?" Marco was using his best manners, but in a way that led Chris to the conclusion that it wasn't so much of a request as an expectation.

"Marco, you know I'm happy to help you and your team get the most from your machine. I have to be over the other side of town on Tuesday. I won't be able to come in and help her that day." Chris had decided today was the day he'd be playing hard-ball with Marco, a loyal Carlton customer who'd just bought an expensive new machine from him (albeit at a rock bottom price), but who was expecting much more free after sales service than Chris - and his boss - felt was fair.

"OK, I know, you're a busy guy, selling lots of coffee machines, huh! That's OK. She's on again on Thursday - you can come by in the morning if that's better."

"Marco, here's my suggestion. Why don't I laminate a little troubleshooting sheet for Lanie - and all the other staff, who with all the training we've given them look like they've got the machine down pat - and if there's any issues, she can just give me, or our technical service team, a call?"

Marco scrunched up his nose. "I can't have pieces of paper lying around here Chris. The only way the team learn is hands-on instruction. You're the expert at this machine. It cost me a fortune - I need to you make sure all my staff can use it properly, hey?"

Chris audibly sighed. On the tip of his tongue were words about how, if Marco wanted such high-touch service, he should have paid for the extra service & training package that he said he wouldn't need. Before Chris could form the words into a sentence, Marco continued.

"I know I'm asking you to be in here a lot, Chris. I'm not silly, I know you've got other machines you have to sell. But this is important to me, and I'm a loyal customer, and don't I spread the good word about you? Didn't I tip Collette your way? We're nearly there Chris - it's a good machine, the staff have all been saying how helpful you are, and I feel good about this purchase Chris. I'm rethinking the beans thing - I'm having problems with this other supplier, and who cares if I love the taste? If clients are happy with your beans, and the price is OK and the supplier is reliable, like you... well. I'm just waiting to see if I can get out of the deal I made with the other guys. But if you can see your way to helping me with Lanie another week or 2 Chris, I'd really appreciate it." Marco worked in sales.

Chris nodded and said of course he'd be happy to help Lanie out. Marco's my bird in the hand, thought Chris as he walked out the door. Wonder if I can sell that to the boss?

## #74 - When you don't reply

Simone had had a gutful. With everything else going on in the business, she'd noticed members of her team had become increasingly tardy in replying to her emails or voice messages. She'd also heard a couple of customers complain about a lack of, or late, follow-up.

Simone knew you caught more flies with honey than manure, but the compulsion to deliver a crystal clear message to her team had temporarily overwhelmed her sales savvy. She tapped out the email.

"Here's what happens when you don't reply to emails promptly - someone loses money

- The prospective client waiting on the quote waits yet another day before being able to invest in a tool to increase their efficiencies or attract more paying customers or stymie their mounting repair bills. Your tardiness means they lose money.
- The loyal client waiting for an answer to the question about the technical problems they're experiencing has to fumble another day with their malfunctioning technology and experiences more downtime. Because you couldn't be bothered, they lose money.
- The internal colleague who's waiting on you for information that they need to build you better support tools, more efficient delivery systems, get you ever-better products to sell, has to hold off on giving you more saleable stock. As a result of you ignoring their requests, the company loses money.
- Whoever is sitting there twiddling their fingers waiting for you to come back to them with something important (and they wouldn't have asked if it wasn't important) either forgets about you, moves onto someone else more valuable in their world or harangues you, sending both your blood pressures through the roof. Your stocks go down, your value to others decreases, your emails don't get answered as quickly by others (you started it, right?), your self worth subsequently falls away, your focus on what's truly important gets impaired, and (here's the kicker), because you prioritised other things over their request? YOU LOSE MONEY.

I know you don't want to lose money. I know you don't want to lose the company, or your colleagues, or your clients, money. I know you're smart enough to realise this simple little task - following up quickly on every email, every phone message, within 24 hours - has an exponential impact on cashflow. For that reason, I know you'll take up this challenge of sharpening your speed of replies from this day forth. Thank you for the discipline needed to do this - it's the fastest way to not lose anyone any more money."

A bit blunt maybe, Simone thought. But I owe it to them to remind. The reminder is worth money.

## #75 - Sliding doors

Idling at an intersection waiting for a green light, a still-stinging Jamie heard his Blackberry go bing. It would be another 20 seconds or so before the traffic moved. He had time to look at the email.

If he chose to pick up the phone, Carlton Coffee Machine's Perth sales rep (who'd just been called a liar by a once-loyal Carlton client) would read his boss Simone's pointed message to the team, bluntly asking them all to improve their responsiveness in replying to emails and voice messages. And while the message wasn't specifically directed at Jamie (who sometimes let follow-ups slip, but was much better than many of his colleagues), it would have been the straw that broke the camels back. An impersonal e-blast from the boss on the back of a hard-to-swallow client rebuke would have seen Jamie swear aloud, flick his left indicator on and turn his car towards home. He would have torn around the corner, narrowly missing a crossing pedestrian (who would get the fright of their life) and drive to his house where, questioning his whole sales career, he'd grab a beer, jump on SEEK and start the trawling process. And while mental calm would partially return in the sober light of the next day, at least one of Jamie's cranial suitcases would remain packed, waiting at the door in readiness for another disappointment (which was only ever a sales call away). And Jamie's departure from Carlton - and his chance to leverage and capitalise on all the foundation work he'd done - would have been expedited by 17 months.

What happened instead was, despite the hurt and the desire for distraction, Jamie chose to leave the phone alone and focus on the as-yet unplanned call ahead. He was going to drop in on a loyal friendly Carlton client he'd developed a strong bond with, a friendship with. His rationale was to pump his own tyres up with a friendly face, someone he didn't have to try too hard to like while he wasn't liking himself, and to reassure himself that he wasn't a liar, but someone committed to helping and partnering others long term. He watched the blinking red eye on his Blackberry.

I'll read the emails tonight, he thought. I'm not in the right headspace to interpret them correctly.

The light turned green, Jamie drove on and his still-blossoming sales career took a step forward.

## #76 - Managing Monday-itis

Peak hour Monday morning, snarling traffic, grey skies, a blustery wind triggering hayfever in the hardest, and the post-redundancies culture at Carlton Coffee Machines was flatter than the flattest flat white. Perfect storm conditions for Monday-itis.

Kevin, Carlton's increasingly pale-looking MD, looked at the photo of his family on the desk and thought about the long weekend away he'd planned in 4 days time. Something to challenge you, someone to love and something to look forward to - that was the recipe he'd been told made for a happy existence. Lord knows the challenge bit wasn't a problem. The reminder he'd be having a short week in order to spend more time with his 'rocks' was sufficient propulsion to hook into the myriad of reports and meetings ahead of him.

Catherine, Carlton's sunshine state super rep, sat in the driver's seat of her stationary car, thermo-mug of fresh coffee in hand, and reviewed her ROAD list - a categorisation of calls she'd decided to make in the coming fortnight to put daylight between her and the pack. She'd woken with a dose of seasonal sneezes and stuffed sinuses she'd hoped she'd grown out of. No mind. When your plan is clear and the opportunity to streak ahead is so tantalisingly palpable, it's not so tough to push through with the help of Kleenex, Catherine thought.

Rory, Carlton's measured Marketing Manager, was laying out place cards on the desks in Carlton's training room, readying for some coffee shop managers to join him for a focus group. Not normally a chipper morning person, Rory had found the best way to kick a week off was to start with a group activity that he'd mapped out clearly the week before. Ideas! Feedback! Customer interaction! There's the cure for Monday-itis, he thought. Then it's just a question of maintaining momentum.

Chris, Carlton's teetering Melbourne Rep, stood in front of his shaving mirror, adjusting his hair and practicing meeting new prospects aloud. "Hi! I'm Chris...". He thought sitting in peak-hour traffic was stupid. Wait 'til its died down, Chris thought. Have a little lie-in Monday morning - no-one likes Monday's anyway, Chris thought, particularly in weather like this. Start a bit later, then make up for it later in the week (well, I'll try...). That's the beauty of a reps role - flexibility - and Simone didn't have to know.

And Kostya, Carlton's Kiwi Barista-in-residence, standing in the loading bay, having a gasper and sipping his Ristretto, thinking. Thus past few weeks has been crep, eh? But look on the bright side - I get paid to do what I love. Come to work every day, train people, make great coffee, Rory's getting me more involved in making decisions, and I'm gitting to build a course for all the Rips. And all the money I'm putting away for the shop I'm going to open is sweet. Kostya's poultice for Monday-itis was reflecting on the platform he'd been gifted and the goal he was doggedly pursuing. Then using the power of routine to get you through the dip.

Mary, Carlton's Customer Service Manager, wasn't having such a battle with Monday-itis. In fact, she'd never have to deal with Monday-itis again.

## #77 - Perspective

Carlton Coffee Machines Marketing Manager Rory sat in the passenger seat of NSM Simone's car, staring quietly out the window. Simone drove and thought. She kept a safe and respectful distance from the car ahead of her in Mary's funeral cortege.

I didn't know her well at all, thought Simone. That's so very sad. I spend nearly every working day saying hello to someone, asking them for help or to carry out tasks that seem so important to the business, and I barely know a thing about her life outside of Carlton. I knew she had kids, but I didn't know her eldest was doing missionary work in Cambodia. I knew she had grandkids, but I didn't know one had a severe disability or that Mary spent much of her spare time giving her children respite support. I knew she grew up in the country, but I didn't know she was one of 9 children or that she and her husband had managed a large cattle station for a number of years in the early 70's, or that she was an active member of the CWA right to the day she died on her kitchen floor. How can I work with someone for so long, yet spend so little time getting to know more about the really important things in her life - the things that made her remarkable?

Rory's thoughts had moved beyond melancholy and onto what possible good might be mined from the shock death of Carlton's beloved Customer Service Manager. Mary was a role model for great customer service, he thought. Someone that all the reps liked and respected. Someone who got the job done for internal and external clients without any fuss and, 9 times out of 10, with a big smile. Someone like that can become a rallying cry for the team. We could find a way to build the greatest customer service experience - legendary customer service - and make it Mary's legacy. Rory's creative cogs turned. Simone spoke up.

"Rory, we've got a group who are shell-shocked from the restructure. Our team morale is as low as I've ever seen it, maybe as low as it's ever been. You can see Kevin's trying to hold it together, but the pressure on one person is immense. Now we've lost someone - someone who was remarkable and who sadly I never got to know as well as I should. And, I hope this doesn't sound disrespectful, because it's not meant that way - maybe that's the wake-up call we need. Maybe we're focusing on the wrong things - trying to make more profit and working harder and asking more of everyone. Maybe what we should be focusing on instead is looking after great people - our people. Getting everyone closer, focusing on building and supporting a team of unique individuals with passions and families and quirks, and who, given half a chance, will do their best to do great things. Maybe we should be about giving people a platform to do amazing things. I don't ever want to lose another team member and think "gee, I really never knew them that well." I'm so sad I didn't know Mary better. That's my great loss."

Rory kept looking out the window and nodded. They had a platform - their roles and their business. They had an opportunity to do something remarkable with it. They were fit and able-bodied and breathing. They had what Mary no longer did. A chance to change the world.



## #78 - A tale of two reps

When Carlton Coffee Machines random Melbourne sales rep Chris heard about Customer Service Manager Mary's passing, he dived straight in and phoned half a dozen colleagues to perpetuate the scuttlebutt. When Brisbane sales supernova Catherine heard, she took some time to reflect on how fleeting your opportunity to contribute is, and then phoned her boss to ask if there was anything she could do to help. Then she returned to her ROAD list.

When (as she was doing now) Catherine sat in her car contemplating her next sales call, she would allow an extra 5-10 minutes to review the last call notes she'd printed off and tucked into her compendium. She'd fill out a pre-call planner (including a goal for the call, some questions she'd ask and what she thought a reasonable 'next step' might be) and then she would mentally walk through the scenarios she might face. And she would take some long, deep breaths.

When Chris was in this same situation (as he too was now), he'd check to see how many minutes late he was, pop the boot, grab a brochure, and on the walk from the car to the client's door, try his best to remember the clients name and mentally cobble together details they covered at their last meeting.

When she walked into a clients premises, Catherine's eyes, ears, nose and gut feel went into hyperdrive, seeking out signals that would alter the approach she'd planned. When Chris walked in the door, he was thinking about how he looked.

And when Chris' eyes landed on the client he'd come to see, he put on a big smile, sometimes offer a generous "Maaaate!", and behaved like a long-lost high-school friend who'd come in to repay a loan or share some prized GPS coordinates for where the Snapper were biting. But when Catherine's eyes landed on the client, she rapid-fire noticed their slightly harried expression, the two staff members standing nearby who obviously wanted a moment of their time and the number of people staring up at the chalkboard preparing to place an order. Three red crosses in the mental checkbox Catherine developed to assess how receptive a client might be to her. And quick-as, Catherine made a judgement call to offer the client a 'Plan B' out if they were too busy (the irony being that this simple display of perceptiveness and no-pressure quite often brought a *"no, stay, you're a welcome break for me"* from the client... which they only ever seemed to offer to those that first offered to come back another time).

Both Catherine and Chris had 'artistic sales skills' - reasons clients warmed to them, likeable elements in their personalities, a way with words.

Only one balanced it diligently with scientific rigour, undertaking systematic pre, post and peri-call analysis. Only one could legitimately use the words 'successful' and 'professional' when describing their roles.

And so it turned out, it was the best of sales calls, it was the worst of sales calls.

## #79 - What all clients want

"Sim, what is it that every client wants?" asked Rory, Carlton Coffee Machines National Marketing Manager.

"Well, they want someone they can trust. They want good products, they want value for money, they want... they want back-up support, and they want to deal with reputable people, and..." Simone rolled off all the clichés she'd ever heard or experienced.

"Yes, I agree, they want all those things, and more. But, and I nearly missed this, Kostya reminded me last week about *fundamentally* what customers want, stuff that the research tells us, and it's very simple. People making purchases are interested in just three things. Time. Money. And Peace-of-mind. That's it."

Carlton's National Sales Manager nodded silently, trying to interpret what her Marketing colleague was saying. Rory continued.

"So time, right? They don't want to waste time. They want as much of it to do the things they love as they can get, right? Any time they spend with us, they want it to be easy and enjoyable and worthy of the opportunity cost they've paid to be with us. They don't want lateness, they don't want ignorance or waiting or annoying downtime or time away from their business or their loved ones. It's like we were saying about Mary - dead people would trade everything in for a little more time with the people they love, yeah?" More nodding from the National Sales Manager, timidly getting into the groove.

"Then, money! They don't want to waste it. They want to make the most of the limited amount they have, to earn more of it, ultimately of course to trade it in for... **more time** doing the things they love! So, money and time. But that's not enough. The third thing, peace-of-mind. That what they want to happen will happen, that they've made good choices, that they'll be taken care of and secure and not be blind-sided by anything. They want to sleep well at night knowing whatever and whoever they've invested their time and money in is as risk-free as can be, whatever 'risk' means to them. Time. Money. Peace-of-mind."

Rory let the last reiteration of the simple, time-tested answer to the world's biggest commercial question hang a moment, before wrapping up.

"So what if... we... and hold your 'but's' here a moment, I know there'll be plenty, but I want you to just imagine for a moment. What if, we rebuilt our entire approach to the way we interact with customers, both existing and potential, AND both internal and external, and that everything we did from hereon in dealt explicitly and categorically with those three fundamental customer wants."

Simone's kneejerk reaction was to draw her eyebrows together, push her lower lip upwards and breathe deeply. "I'm not sure what you mean or what that looks like?"

Rory jumped out of his chair like a high schooler after three Red Bulls and went to the whiteboard.

"OK, hear me out!...."

## #80 - Whiteboard germination

He'd exhausted the ink in 2 whiteboard markers and the third was showing signs of giving up the ghost. Carlton Marketing Manager Rory's frenzied scribbling was being egged on by an increasingly excited Simone, and they'd just been joined by Kostya, Carlton's bright Barista (once-in-residence, now-maybe-roadshow). Rory had drawn up one big mother of a table.

"So, Kostya, here's where we're at. We've got 3 master columns here - "Time", "Money" and "Peace-of-mind". Each of those three columns has within it 4 sub-columns - "Pleasure / Goal", "Carlton Solution", "Pain" and "Carlton Solution".

"Now, running down the page, we've got rows for our 4 client groups - "Internal existing", "Internal potential", "External existing" and "External potential". We believe that this T-M-P.O.M. concept doesn't just apply to how we serve the people buying or distributing our coffee machines, but also to our staff. We've probably always just outsourced most of our staff-directed marketing or solution-provision efforts to HR, maybe other than a few quirky bonus promotions. So! We're now calling our staff 'internal clients', because in fact they can have as big an impact on our success - if not bigger - than paying punters. And it's worth us thinking not just about the staff we have right now - though they're our #1 priority - but who we want to have in our crew in the future. This concept should apply to how we approach growth and succession planning too."

"Yeah, that makes sense." Kostya, like Simone, was doing his best to keep up. Rory kept on.

"So! What we've first got to do is think clearly about the most important goals, or pleasures, that each of these key client groups is striving to achieve when it comes to each of our 3 decision-making drivers (time, money, peace-of-mind). Sim and I have been spitballing a few for our existing internal clients."

In the existing staff members 'time pleasures' box, Rory had written things like "family friendly work-hours", "instant access to important information", "available bosses" and "fair expectations for follow-up timeframes". Next to these topics, in the "Carlton solutions" box, they'd begun to put down some ideas on ways Carlton could improve how it helps people achieve these pleasures.

Rory stopped writing a moment and looked at his colleagues.

"OK, we can keep doing this in isolation, but I think we're missing an opportunity if we do. I say we get the whole business involved. I've got to run this by Kevin first, and we'll have to figure out some ground rules, but if we can get everyone in our business, and a good number of those outside our 4 walls from the other client categories, all putting in their 20c worth on what clients want and what bothers them around time, money and peace-of-mind, AND they can put forward ideas for us as a leadership team to filter and priorities... this is so simple. But we've never done it. I think we have to."

## #81 - Through a client's mind

Marco eyeballed the rep.

"You promised your deliveries would be here on time, and twice you've been late in two weeks. So don't tell me I've got a contract. You. You're in breach of contract!"

"Sure Marco, I'll look into the late deliveries - that shouldn't be happening, and if it has, we'll make sure it doesn't happen again. The thing is, your supply contract is for 12 months, and because we've locked you in for a very good price, as you knew, there's a penalty clause if we break the contract early." The rep knew enough not to smile with his mouth, but the twinkle in his eyes infuriated the coffee shop owner. He didn't like being backed into a corner.

"Don't give me your *"if it has"*! You were late, and that cost me money! I gave you a chance. I tried you when I could've very easily stayed with Carlton, who were offering me just as good a deal, and who I know are reliable. But I liked the taste of your beans, and you seemed very genuine, and I took a risk. Now, only 4 weeks in, and your deliveries have been late a total of three times, and I've had several customers - many customers - complain they don't like the taste of the coffee. So as far as I'm concerned, *you've* breached your contract, and I'm not going to purchase beans from you any more. And if you make this difficult, not only will you never get any business from me again, but you have no idea just how many people I know in this business who won't deal with you either."

Not normally prone to fits of pique, Marco was sufficiently riled by this rep's smugness to throw out a couple of unveiled threats - some real, some exaggerated. Marco had made the hasty decision to go with the competitor's beans over the combo deal Chris from Carlton had offered him (even though he'd screwed Chris down to the combo price for the coffee machine alone). He liked the taste of the competitor's beans better, ergo he thought his clients would. And, for the most part, they probably did (who knew? He never asked). But two regular clients had mentioned they'd noticed the change of taste. And Marco knew that if they didn't follow that statement with something to the effect of "I love it!", he knew they didn't. But it wasn't the taste that was the problem. They were late in delivering. And so early in a supply arrangement? That rang alarm bells. So before him stood the competitor rep trying to cling to the hope that the 'contract' would protect his newly-won business. Survey says Bah-BAH!

"Here's what's going to happen now, my friend. You're going to tear up that contract, and I'm not going to tell everyone I know - and you have no idea how connected we are on Twitter and Facebook and goodness knows what else - just how terrible your supply is. And maybe I give you another shot at the business in a year. But if you make my life hard here, my friend..."

He didn't have to finish the sentence.

## #82 - Have your say

Simone bounced out of her 3 hour meeting with Rory, Kostya, and towards the end, Carlton MD Kevin and HR Manager Lynne. She was pumped. She paused in the hallway and ran her eye down just one of the 9 pages of notes she'd made.

"Time. Money. P.O.M. All sales messages - internal + external - stripped back to this fundamental purchase driver trifecta. Cut the crap. Go simple. Applies to *all* clients, incl. staff.

Kevin onboard. Limited funding for projects - ? relatively low cost anyway, keeping with Money theme. Formalise plan & run scope & costings by him next Tuesday. Cc Lynne on HR-related initiatives.

New Initiative (NI) 1 - "On-the-clock Leadership meetings", bring-a-plate working lunches e@ Friday 12-1pm. Agenda - Our progress vs Rory's table of activities re: time, money & POM issues for 4 partner groups (internal existing, external existing, internal potential & external potential). Forum consistent with T / M / POM platform, demonstration to staff of our belief in this approach.

NI 2 - Staff focus group - "Plunger sessions" - what do staff see as key T / M / POM issues for themselves / others? Ideas / suggestions. Ongoing forum, hold weekly, Rory & I co-chair. Get agenda together & draft invitation for first one (compulsory for all staff - feed them, BBQ). Hold during non-productive time (addresses M & POM), keep to 45 mins (addresses T).

NI 3 - Broader partnership focus group(s) - "Carlton catch-ups"? - Family event, inviting staff & select clients / suppliers & all their families (addresses T & POM for them). 6 - 8pm Monday night, to minimise impact on client businesses (addresses M). Hire movie theatre, free family-friendly movie option for spouses / kids. ? jazz quartet & wine tasting in cinema private lounge for those without kids. Clients in focus group session with us for 1 hour in empty cinema, then networking drinks & nibbles & guest business coach presenter. All to have input into T / M / POM initiatives they'd like to see, plus demonstrate our commitment to helping them in these 3 key areas. SA first, then roll-out across country.

NI 4 - Continuous Professional Development - Create "The Dripolator" virtual & actual Carlton Trade School for all partners (internal, external, existing & potential). Vehicles include travelling roadshows, daily forums, resource pools, a 'blast-test lab'.... content development in conjunction with Kostya & hand-picked rotational partner teams....

And on the initiatives went. Simone's challenge now, to prioritise and place all next-step activities into distinct time homes in her diary and get moving.

The concept was simple. The plan was forming. But the only way anything could brew out of it?

Action.

## #83 - It's too expensive

Catherine, Carlton Coffee Machines Sales Superhero, was perusing the responses to a question someone had posted on the wall of a *LinkedIn* sales group she belonged to.

"Hi! I work in B2B sales and our products - capital equipment - are towards the top end of the market. One of the objections I get all the time is *"It's too expensive"*. How do other people deal with that?"

Catherine trawled through some of the responses, judging the contributors as she went.

"For what you're getting - the quality - this is an outstanding price" said the kinda arrogant one.

"Well, I might be able to move a little on volume / bundled purchase" said the bigger-picture thinker (but giving in too early for my mind).

"We do have a range of lower cost models I can show you" said the ego-bruising realist.

"What would it take to get you to take this deal today?" said the dodgy used car sales one.

"Let me speak to my manager, I'll see what we can do" said the guy at the desk opposite his used car yard mate.

"Yes, it is expensive. But you get what you pay for" said the supremely confident one. Lose the but.

"Well, how much can you afford?" said the incredibly presumptuous one looking for a slap.

"That is the price" said the principled one who Catherine bet wouldn't sell much.

Every man and their dog is an expert here, thought Catherine. How do I deal with this scenario?

Well, she thought, the first thing I do is tilt my head a little, nod slowly, get an almost neutral look on my face that balances 'I'm a little perplexed and don't hear that much' with 'I want to help you here', and say the words "How do you mean?" The situation generally becomes a whole lot clearer in the subsequent 5 seconds.

She resisted posting her thoughts. Why give it away? Never know who's reading these things.

## #84 - Sticky fingers

As work days went, Chris wasn't having a bad one. The sun was shining, no-one had yelled at him yet, and in the last few days, Carlton Coffee Machine's dented-model sales rep had picked up a couple of decent beans contracts along with a *Robusta Grande* promotional deal he'd thought was dead in the water. His boss Simone, who'd had him on performance management for the past month, was leaving him alone of late, more preoccupied with the company changes and some new concept she and the marketing bloke were putting together (who knows?)

Standing at the counter of a recently opened coffee shop waiting for a prospective new client to come out from the kitchen, Chris idly perused the array of flyers, staff rosters and promotional items sitting on the customer side of the counter. His eyes moved to just by the cash register, where he spotted what looked to be the brochure of a new machine & beans competitor, Et Tu Coffee. He'd heard about them - they'd been aggressively stealing what Chris considered to be his business - and seen their logo in an online trade publication. Their new machine specs were apparently even better than the *Grande's*. Chris hadn't seen their print collateral before. Wonder if it's got pricing in it? Even specs? The Carlton marketing team had only recently asked for any market intelligence on the infidel to be reported back. Wouldn't hurt to earn some brownie points with them - Chris had a feeling one day soon he'd be reporting through to the Marketing Manager Rory. And it looked like, attached to the cover of the brochure, was a sample foil of ground coffee.

Chris looked around. The brochure was in arms reach. He could see that the coffee shop manager was still busy in the kitchen with his back to Chris. The waitresses were out on the floor serving and clearing. He had a few-second window of opportunity. Take it, or not? Surely they won't care.

Chris casually leant over the counter and put his hand on the brochure, nestled between the tips jar and the cash register.

"Excuse me, what do you think you're doing?"

## #85 - Mixed signals

As far as everyone was concerned, Chris's protestations missed the point. Maybe the cafe owner believed he wasn't trying to steal from the tips jar, or even worse, the register. Maybe they even believed he wasn't going to steal the competitor brochure, that he was just going to look at it (though truth be told, they were absolutely convinced he'd planned to stuff in his compendium). Even if all they thought he was going to do was what he'd repeatedly bleated - he just wanted a look! - it still grossly breached trust he hadn't earned. Protocol, etiquette, manners, common sense - who the heck leans over a counter on the sly in a sales call to grab what's not theirs? Out of the store on one ear, the other ringing with threats of head office complaints, which were carried out swiftly (never mind the industry gossip that resulted).

The phone call to Carlton's Head Office to complain about their fingers-in-the-cookie-jar Melbourne sales rep led in the first instance to Chris receiving a pointy phone call from his boss Simone.

"Chris, how could you be so stupid?"

"I was JUST GOING TO LOOK!" said Chris, feeling himself backed once more into a career corner.

"I've got to speak to HR about this" said Simone. "Chris, you know you're already on thin ice. It's a serious accusation." The NSM didn't have her team member's back.

"This is crap. Marketing have been repeatedly asking for market intelligence from us. I went out of my way to try getting them something no-one else has given them - something solid on Et Tu - and I didn't steal anything, and I didn't break the law." With every word, Chris' blood pressure rose, and his belief in the validity of his actions grew.

Simone spoke before she thought. "Chris, you were stupid. I'll..."

"Don't you dare call me stupid! I'm hanging up now, and my next call is to HR. This is bullying, and all I did was follow orders from marketing. You've done nothing but try and get rid of me since you took this role. I don't know what sort of a boss you think you are, but if you think you're motivating me.... what about all this crap about 'time, money, peace-of-mind'! We're done - go waste your time bullying someone else." And he hung up.

Simone sat in stunned silence a moment. If only she'd been in the roomful of mirrors. Instead, she tried to play a game of he-said, she-said and raced to beat Chris to get HR on the phone.



## #86 - Rock turning

Oblivious to a career-ending storm brewing between her colleague Chris and her boss Simone, Carlton Coffee Machines sales wunderkind Catherine sat in her car and once more studied her ROAD list. Clients she'd seek to get referrals from. Prospects she'd get out and sell the offer to. Suspects she'd offer a free machine audit. And, for her most loyal long termers, valuable initiatives she'd gift them in order to delight.

Catherine knew how most colleagues were spending this week leading into Christmas. Counting time. Flexing it. Catch-up lunches with friends or colleagues. A few hand-shaking, mince-pie-exchanging merry-holidays courtesy calls to a small group of clients they liked. Tidying up their filing cabinets. Sample stock counts. Generally resigning themselves to the fact this was a wasted sales week, no-one was making big decisions now, and besides, most of their hospitality industry clients were too busy at this time of year to spend much time with them. Kick it back a gear - it's Christmas.

Catherine thought differently to most reps.

On a normal sales day, Catherine would set herself three clear goals to achieve (along with at least one goal per meeting). But this was 'rock turning week'. She upped the ante to 5 goals a day. She figured clients weren't being pestered for sales from other reps, so competition was less. She knew this busy time in the hospitality sector brought the terms 'time', 'money' and 'peace of mind' right to the front of client minds (as they found themselves short of all three). She remembered her clients were businesspeople, and that the savvy ones were, like her, planning for the year ahead, and if she could support their planning... She knew many clients liked a friendly chat and a mince pie, but she knew they'd be more grateful in the long term for someone that stayed focused on helping them alleviate a pain or grab a golden ring. She knew her role was to stay focused.

But most of all, Catherine couldn't bring herself to contemplate going into a break without having crossed the line with lactic acidic oomph. Leave nothing in the tank, an old boss once told her. Have a red-hot crack and go home happy-exhausted. That's the only way anything great ever got achieved - why should we in sales be any different?

One more call, thought Catherine. While everyone else settles, I'm pushing.

## #87 - Out

It was more a case of unfortunate timing than any straw breaking a camel's back.

Simone thought it remarkable she could get both the HR Manager and her boss, Carlton Coffee Machines MD Kevin, together in her office at such short notice. All she was seeking was endorsement to terminate Chris' employment.

It didn't quite go that way.

"Simone, put this issue aside a moment, it's unrelated to what I'm about to say. The structural changes we've made in outsourcing production have trained the spotlight firmly on our ability to sell more, more profitably, and fast. The personnel cuts we've made were essential, but the Board, and our bottom line, needs more. Subsequently, we've decided to make your role redundant. A combined Sales & Marketing Directorship has been created, and Rory will head that combined sales and marketing team.

"Your service has been very much appreciated Simone, and on a personal note, I think you've done a good job. Of course you'll receive all your redundancy entitlements, and my reference will be very positive. You understand of course that we need to make this change effective immediately. Lynne will stay here with you now and run through an exit checklist. I'm sorry it has to be this way Simone. If down the track there's anything I can do..." Lynne's shut-up look prompted Kevin to think better of finishing the sentence. Simone wouldn't have heard it anyway. The white noise of blood rushing through the capillary network surrounding her inner ears drowned out the subsequent awkward silence.

Days later, as Simone sat at home working her way through the grief curve, she remembered the look of pity on Kevin's face. More than anything, more than the fact she was absolutely and unfairly blindsided, more than her being moved on as Chris stayed put despite gross ineptitude, more than the shattering sense of betrayal and inequity she felt, it was that look of pity that infuriated her most. It was the single biggest reason that, for the next 30 years of her largely successful working life, she'd refer to Kevin as the most useless boss she'd ever had.

Somewhere in an inner city Melbourne pub, the Christmas beers were on an unjustifiably smug Chris.

## #88 - Regroup

"OK, great, I think we've got everyone online now. Let's go!"

Carlton Coffee Machine's newly-crowned Sales & Marketing Director Rory sat in the Adelaide head office boardroom. An audio conference phone sat in the middle of the table and a small number of his Adelaide-based team sat at his flanks. Silent sales bods from around the country listened down the line.

"Thanks for carving out this time, guys. I know it's a really busy period, and I'll keep this punchy. I've been able to speak to each of you individually in the last 24 hours, and you all know about Simone leaving the business. She's going to be missed, she's a great person and she achieved some fantastic things. I think she's left us a great platform to build on next year."

Truth be told, while Rory liked Simone, he could see her 3 strikes coming. First, as was the Carlton way, a sales manager has to live and die by the sales results. And they just weren't coming fast enough. Second, despite her historical achievements, Simone had taken her eye off the ball and didn't really have any clear 2012 sales plans for her team members in place, and she'd actively disengaged with a couple of her team members. Third, she consistently managed to see the half-empty part of the glass, and that always gets noticed. So when MD Kevin (under omnipresent pressure to make changes to up the profit) saw her falling short right across the results-behaviours-attitudes cascade, his tough choice was made easier. And Rory, backed with a portfolio of innovative & reasonably successful campaigns, clear 2012 marketing plans and a team who loved working with him for his positive can-do-ness, was the obvious promotion choice.

"Change! It never seems to go away, does it? I don't mean to sound like an *Inspirations* poster, but you know it's an ever-faster-moving world we live and work in, and I don't imagine that's going to get any easier. But I think with all this change comes some amazing opportunities. To be better, different, more valuable, in ways we never used to be able to. I personally think we're blessed here at Carlton - we have an amazing trifecta *right here*. We've got a team of amazing, talented, driven people that want to help other people and achieve success. We have a company and an evolving product line that's stood the test of time by sticking to clear values, but at the same time never being afraid to shoot sacred cows. But maybe most of all, we've got a marketplace that's *growing*. A group of customers - people - that need more help and better products and support than ever. And we can help them." Rory took a breath and let it sink in a moment, before wrapping up.

"There's just a few days to Christmas, and I know you'll all be running to look after your loyal customers in these remaining days. But when you break - and I implore you to take a well-earned rest - as you kick back and chill, I'd love you to think a little about what you'd like to achieve next year. What would be amazing if you could do it, if *we* could do it. I dare you to dream a bit. Because when we come back, and we come together for 2 days in that second week of January as a combined sales & marketing team - a customer-focused team - we're going to each nail down our 2012 plans and disciplines. I'm under no illusions - next year will not be easy. My commitment to you - I'll give you everything I have to make sure we take this company to places it's never been before. I will continually ask the same of you. And I will keep bringing you back to the only reasons people choose us. Time. Money. Peace-of-mind. That's what we'll help our clients with. That's where our success will come from. Have a great day, and smile! This is an amazing place to be!"

On the line in Melbourne, Chris got a lump in his throat.

## #89 - Focus

Immediately after the conference call, new Sales & Marketing combo-deal Rory phoned Catherine, the superstar Carlton Coffee Machines sales rep from Queensland.

"Catherine, I'm not sure how much Simone spoke with you about it previously, but I see a huge opportunity for you to take on more leadership responsibilities within the sales team. Your disciplined approach and results are exemplary, and if we can find ways to actively rub some of your habits off onto others in the team... well, I could use some help, and some of our team members will need role models and mentoring guidance." While the two-hatted Rory was saving the company a senior salary, he wasn't naive enough to think he could do it alone. Here was a rolled gold chance to offer recognition and job enrichment to a proven performer with the respect of her peers and the time management capabilities to mentor and perform her critical sales duties.

"Thank you Rory, I appreciate you saying that. It means a lot, and it wasn't something Simone had ever really broached with me. I'm not sure why. I have however already thought about it, anticipating that this might be asked one day, and I'll be frank. I'm not interested in taking on management duties. I love what I do, I'm good at it, and I've got a plan to achieve some pretty impressive sales results in 2012. I'm always happy to offer any ex parte guidance to those reps that get off their bums and seek it out, but I have a family here in Queensland, and I've got no desire to disrupt the balance I've worked hard to achieve. Besides, I think given the need for this company to boost sales, and quickly, the best use of my time is doing what I'm damn good at."

"Well, I respect that Catherine. Part of me wants to send you out with the team to counsel them in sales disciplines and how to run a territory, but I know what your passions are, and I want you to work them to the hilt in 2012. You've earned that choice, and you're right, we need big sales. Any 'passenger mindset' that might have existed in the team will be gone, even if it means more changes. We will get the right people in here to help us achieve our targets, and I'll make the space for them to do it." Rory felt he could entrust this proven committed performer with sound bytes he wouldn't trust others with.

"For what it's worth Rory, I like the simple 'time, money, peace-of-mind' concept you're introducing. It's simple language I try using in my sales calls already. So if all of our communication is in simple, clear, relevant customer terms, then I think it can only be a good thing. I don't believe what we do is really difficult. It just takes thinking, planning and disciplined execution. I'm looking forward to you coming to Queensland - there are some great people I'll get you in front of where you can help me nail down longer term partnerships. When can you come? I could use you here in early January." She didn't miss a trick.

As Catherine finished her sales pitch to her new boss, sales team passenger Chris was getting out of his car to enter Marco's coffee shop one final time.

## #90 - Every day

"Ah, here he is! Chris, my friend, how are you!" A big grin and expansive hand gestures from Marco, obviously caught on a good day.

"Hi Marco, Merry Christmas to you" said Chris, the Carlton Coffee Machines sales rep who, if a poll had ever been strawed, would have been voted 'most likely to screw up' by his peers. "How's the machine?" he added, referring to the shiny *Robusta Grande* that Chris had sold to Marco just months before.

"Ah, it's good, it's good. Is it making me more money though Chris? That's the question! Tell me, do you remember what I said to you about buying this new machine? How many extra cups of coffee I'd have to sell each day to pay for it?" The cheeky smile spread across Marco's festive face. Chris returned with a restrained smile and a knowing nod.

"42, Marco. How could I forget."

"Yes! Yes! Well, I can't say I'm selling 42 cups more yet Chris" said the cafe owner, always keeping his supplier a little on his toes. "But, I have to say, it's a good machine, and I think we're getting quicker with it, and you've been very good Chris, always training my team, always looking out for me. I appreciate it. Here, I'll make you a coffee, on the house. And look. Carmella made you some Biscotti. Merry Christmas Chris, and thank you for all your help." Marco pulled a cellophane-wrapped package out from behind the counter, walked around and handed it to a humbled Chris.

"Marco. Thank you. That's really kind of you, and Carmella. I'm a bit embarrassed." Chris paused for a moment, then looked Marco in the eye. "Marco, every time I come in here, you're always so happy and positive, even when it's really busy. How do you do it?"

The jovial cafe owner grabbed Chris by both forearms, smiled, looked into his eyes and said,

"Chris, it's simple. If you love what you do, it's easy. If you don't love what you do, then my friend, *change* what you do. It's your choice to be happy or not, Chris. You're the only person that can make that choice, huh! You have to make it every day too! And running a business is really hard, so I think you better love it! We're so lucky, you and me! Hey, who wouldn't want all this?! Choose to be happy, Chris!"

And at that moment, Chris made his choice.

**The end.**

(Thank you to all who helped inspire and shape this tale, and thank you for reading.)

