

# MBOE Gate 4 Presentation

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A Cable Company

12/12/12

# A3 Project 1

Title: Improve Performance of Open Mentoring Tool and Develop Effective Mentoring Program  
Date 8/14/2012

Sponsor: Bob Jones Coach: Ali Yonel

Background: Mentoring within sales is a corporate objective and value tied to Talent Development. 2009 Open Mentoring (OM) Pilot delivered substandard results. Current OM metrics are below target, and senior management is dissatisfied. It is believed that renewed focus on mentoring will improve metrics of OM and creation of an effective program for Sales will reduce ramp time, drive revenue growth, and improve job satisfaction!

**Goals:**

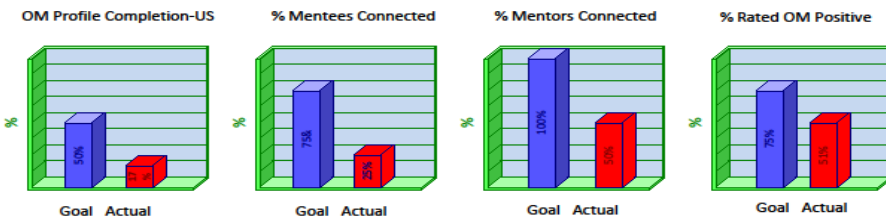
- OM usage near targets with strong mentor pool to support mentee demand (PDCA for Phase 2)
- 15 new mentoring engagements in EN Sales by 6/1/12
- Experiment to create effective mentoring process for EN Sales and assess with key metrics
- 75% of Sales participants satisfied at end of pilot period (60-90 days)
- Document and Implement best practices for Phase II

**Strategy:**

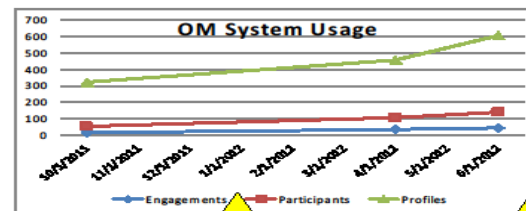
- Form sales mentoring teams within OM system, and establish individual relationships
- Learn by doing and experimentation
- Survey Sales participants to establish base line metrics
- Metrics include Job Satisfaction, Engagement, Rate of Development, and Incremental Sales Growth
- Investigate performance differences Group vs Individual to develop best practices



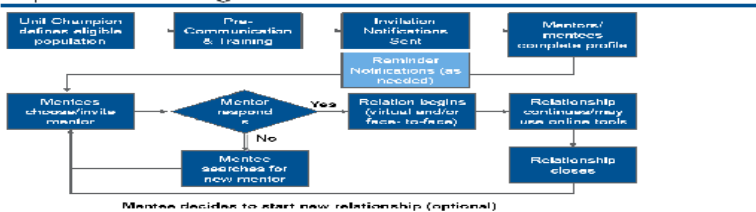
**Initial State (October 2011):**



**Progress to Date:**



**Open Mentoring Process Flow**



ID	Task Name	Start	Finish	Duration	May 2012		Jun 2012		Jul 2012		Aug 2012	
					5/20	5/27	6/3	6/10	6/17	6/24	7/1	7/8
1	film CFO video to recruit mentors	6/1/2012	6/8/2012	1.2w								
2	Survey Mentees for baseline	7/18/2012	7/25/2012	1.2w								
3	Mentor groups formed, planning time	6/20/2012	7/20/2012	4.6w								
4	Sales Mentoring relationships begin	7/10/2012	9/10/2012	9w								
5	Open Mentoring rollout to EMEA	6/13/2012	8/15/2012	8.8w								
6	Measure progress of Sales program	8/1/2012	8/15/2012	2.2w								
7	Act, correct, improve Sales program	8/13/2012	8/24/2012	1.6w								
8	Relationships continue	8/27/2012	9/26/2012	4.6w								
9	Measure, relationships conclude	9/26/2012	10/3/2012	1.2w								
10	Phase 2 Preparation	10/10/2012	11/9/2012	4.6w								

# Open Mentoring Dashboard (October 11, 2011)

Vs. Last Report

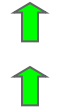
## Profile Completion by Band



Band	Yes	No	Total	Rate
A	19	87	106	18%
B	42	312	354	12%
C	97	309	406	24%
D	61	168	229	27%
E	34	54	88	39%
F	11	18	29	38%
88	8	15	23	35%
<b>Total</b>	<b>272</b>	<b>963</b>	<b>1235</b>	<b>22%</b>

## Profile Completion by Country

Vs. Last Report



Country	Yes	No	Total	Rate
Australia	1	0	1	100%
China	98	53	151	65%
Denmark	1	0	1	100%
Mexico	21	147	168	13%
USA	151	763	914	17%
<b>Total</b>	<b>272</b>	<b>963</b>	<b>1235</b>	<b>22%</b>

- Current number of Engagements = 15
- Participants currently connected in Engagements = 37

### Upcoming Activities

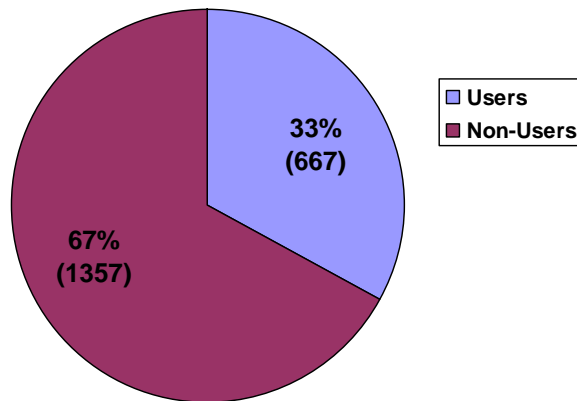
- Targeted communications
- Mentoring skills webinar(s)

### Sample Focus of Engagements

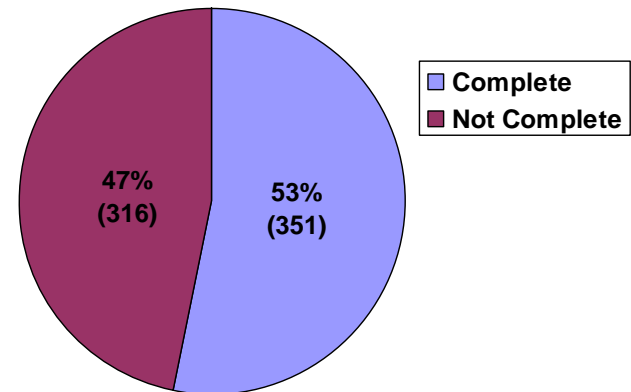
- Capability effort project management
- Build interpersonal savvy
- Technology management
- Engineering strategy
- Management skill improvement
- Product cost analysis
- Strategic analysis and presentation skills

# Open Mentoring Dashboard (April 16<sup>th</sup>, 2012)

Out of ~2000 potential tool users, 1/3 have logged in at least once



Out of 667 tool users, >1/2 have completed their profiles



- **Total in-scope population = 2024** (w/o EMEA)
- **Participants currently connected in Engagements = 70** (35 separate engagements)

## Upcoming Activities

- Communications reminder (with Amy story) with encouragement to participate
- Individual reminders to all regions (ex. EMEA)
- EMEA project planning of transition to tool

## Most Popular Competencies to Work On

(within existing engagements)

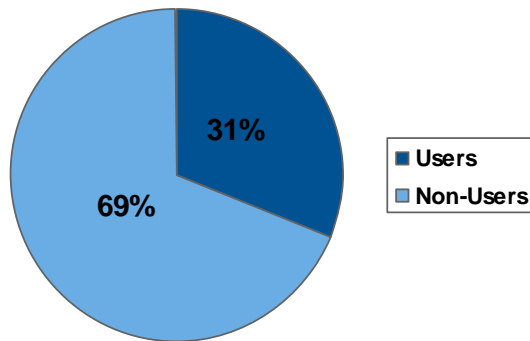
- **Presentation Skills**
- **Business Acumen**
- **Project Management**
- **Financial Analysis & Management**
- **Managerial Courage**

## **Strategies to Increase Engagements:**

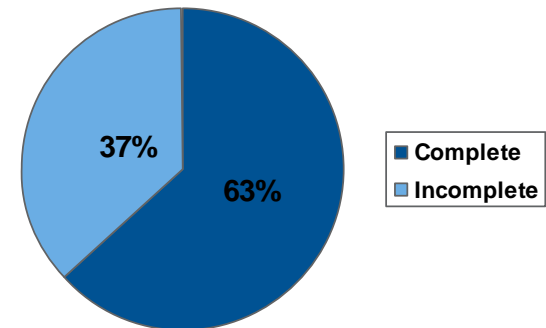
- Add EMEA region
- Emphasize “topical” and “situational” mentoring options
- Schedule webinars and face-to-face training

# Open Mentoring Dashboard (December 4<sup>th</sup>, 2012)

Out of 3272 potential tool users, 31% (1005) have logged in at least once.



Out of 1005 tool users, 633 (63%) have completed their profiles



- Total in-scope population has increased 23% since last update. Total number of users has increased 10% since last update.
- 358 total engagements/relationships (some connected in more than one)

## Ongoing & Upcoming Activities

- Currently running several facilitated engagements
- EN Sales group mentoring continues
- Ongoing linkages to L&D initiatives by region

## Most Popular Competencies to Work On

(within existing engagements)

- Conflict Management
- Presentation Skills
- Informal Influence
- Project Management
- Business Acumen

## Strategies to Increase Engagements:

- Continue to emphasize group mentoring options
- Schedule webinars and face-to-face training

# Progress to Date

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**OM System  
Usage up 6%**

**Number of OM  
users up by  
42%**

**37% increase in  
number of  
engagements in  
OM**

**Sales Pilot  
moving forward  
w/ 17 Mentors  
and 23 Mentees**

**Mentor and  
Mentee training  
completed 5/22/  
12 in NC.**

**Mentor  
Recruiting  
Video by  
CFO**

**OM  
EMEA  
Rollout**

# Project 1 Hurdles

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- Revenue Shortfall
- Mentor positions not funded
- **Conflicting priorities, new initiatives and requirements for sales**
- Mentors could not engage fully
- Organization restructured
- Director / Sponsor retired
- **Promotion and new focus**



**Improve team  
performance  
through MBOE  
Learning!!**









# Visual Metrics—SFDC Dashboard

## S.Central 2011 Dashboard

[Help for this](#)

Find a dashboard...

[Edit](#) [Clone](#) [Refresh](#)

As of November 15, 2012 at 4:47 PM

Viewing as G

Dashboard highlights all the important metrics.  
Wall of Fame & Wall of Shame on Right side.

### S.C. SE Activities, last 30 days

Type = Meeting, Other, Phone Call

Created By	Record Count
[Profile]	88
[Profile]	85
[Profile]	51
[Profile]	40
[Profile]	36
[Profile]	22
[Profile]	21

### S.C. Stage Duration > 90 days

Opportunity Owner	Record Count
[Profile]	29
[Profile]	20
[Profile]	12
[Profile]	8
[Profile]	7
[Profile]	7
[Profile]	3

### S.C. Oppty's with No Activities in last 30 days

Opportunity Owner	Record Count
[Profile]	31
[Profile]	31
[Profile]	30
[Profile]	16
[Profile]	10
[Profile]	8
[Profile]	6
Curt Billings	1

### S.C.

Sum of Amount, > 50, > 60 last activity

Opportunity Owner	Sum of Amount
[Profile]	USD 500K
[Profile]	USD 402K
[Profile]	USD 150K

### Neglected Opportunities

\$100k Last activity > 30days

Opportunity Owner	Record Count
[Profile]	23
[Profile]	13
[Profile]	9
[Profile]	8
[Profile]	4

### S.C.

Stage Coach Score, > \$100k, < 30days

Opportunity Owner	Sum of Amount
[Profile]	USD 900K
[Profile]	USD 800K
[Profile]	USD 660K
[Profile]	USD 490K

### S.C. Joint Sales calls last 30 days

# Visual Metrics—SFDC Gauges

Find a dashboard...

Edit

Clone

Refresh

As of September 25, 2012 at 2:34 PM

Optimizer Total Salls - Current Month



Record Count

Optimizer Oppt. Calls - Current Month



Record Count

Optimizer Joint Calls - Current Month



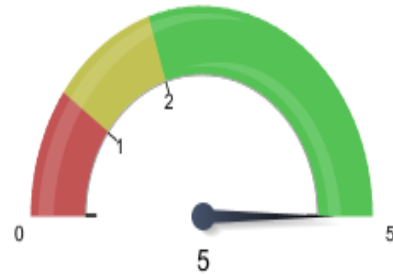
Record Count

Optimizer Branch Reviews - Current Month



Record Count

Optimizer New Biz - Current Month



Record Count

# Questions?

Thanks for your time!