

## Workload Management Boosts Sales Team's Growth Potential



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### **Problem to Solve**

Balancing workload effectively is critical in any organization, and particularly so within health care, given heightened industry and internal demands for quality, efficiency and effectiveness. An imbalanced workplace can lead to high productivity among some team members and under-utilization in others, potentially leading to employee dissatisfaction, decreased morale and expensive turnover.

The sales team for a business segment of a large health plan had experienced significant recent growth and was projected to grow even further. The health plan's leaders wanted to ensure that the sales team had the right amount and type of staffing to support its growth goals and avoid any work volume-related issues. While workforce efficiency was important to the sales team, so was achieving a reasonable work-life balance, helping guarantee long-term staff satisfaction and retention.

To ensure that this sales team had the best workload-to-staffing model in place to allow it to achieve its ambitious sales goals, the health plan engaged Freed Associates (Freed) to objectively assess the team's current workload

and make recommendations for a future staffing model. Owing to the seasonality of the sales team's business cycle, the assessment and recommendations needed to be completed within a tight timeframe.

### **Strategy and Tactics**

The engagement began with an evaluation of the sales team's current staffing model, including interviews with key staff members. The goal was to identify how sales team employees had historically been spending their time throughout the sales year on their designated tasks, as well as, interacting with one another. The sales team had recently been tasked with several internal business optimization and process improvement goals, to enhance the team's efficiency, so now was an optimal time to assess the team's progress.

The assessment also needed to factor in a recent restructuring within the sales team which added a new management layer. Some members of the sales team had been promoted to new middle management roles, while others remained in their prior roles. A major question to be answered was if these promotions significantly changed how these team members spent their time.

The assessment determined that to a person, members of the sales team were highly dedicated and committed to their roles, and willing to put in extra time as needed, especially during peak sales cycle periods. An "all hands on deck" type of team mentality. Overall, the sales team's current staffing model was working well, with staff member morale surprisingly high despite their often-sizable workload.

Still, there were multiple potential staffing issues found:

- Insufficient full-time employees in critical sales roles (particularly in sales support) to keep pace with the team's sales growth goals and quality work standards
- Regular project work overlapping with peak sales season, potentially compromising pace and quality
- Risk of staff member burnout and employee turnover in key positions due to persistent overtime demands

### **Results**

Freed made recommendations to address the sales team's most critical needs, including addressing the sales support staffing shortage and the risk of staff burnout and turnover due to ongoing overtime issues. Specifically, it was recommended that the sales team add additional support resources, as well as deploy a new staffing model that adequately staffs each critical team role. This would allow employees to continue to produce high-quality work.

To handle the historic imbalance between the sales team's ongoing project work and seasonality sales, it was recommended that project work be reduced during the peak sales season and that the team's multi-functional "utility" employees (those able to assume multiple roles) prioritize core sales work. Additionally, to reduce the

stress on any one sales team member, a coverage strategy was determined for each team member, leveraging redundancies in staff knowledge.

It was also recommended that the sales team add two new roles: A dedicated business development role, so that multiple current staff members would not have to handle this work, and an executive consultant, to serve as an external and internal liaison on behalf of the sales team. This would allow the sales team's leadership to focus more of their time and energy on sales strategy and execution.

Overall, implementing these recommendations should enable the sales team to improve its productivity and efficiency, boost its sales potential, and heighten staff member morale, thus reducing the likelihood of turnover.

### **Conclusion**

When a department or team undergoes organizational changes to enhance its growth, it's important to look at the basics, such as ensuring that these changes also correspond with individual workload expectations. By proactively determining that a key sales team's workload management needed adjustments and improvements, the health plan enhanced the team's sales growth potential while decreasing the likelihood of departure and incurring significant costs to replace talented employees.