

How I moved my team from last place in the country to first!

BY
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In 1995 David McAvoy became Regional Director of the Regulated Sales Force for one of the largest financial services companies in the United Kingdom. There were many positive aspects of David's new job — good people, a good product and a huge customer base.

But, the job brought frustrations for David as well. His team were the worst performing Region, attaining only 60% of its annual sales targets. In addition, staff satisfaction was at an all time low, recruitment was slow and attrition was fast.

On a personal level, David had been giving everything of himself to the job. But, because progress was slow, he wasn't satisfied. His children didn't see him much and although she was supportive, his wife Teresa didn't really understand David's issues.

The Need for Change

It was at this point that David knew he needed to make some big changes at work and at home. With the help of Best Year Yet™ David was able to do just that.

A proven method that uses a simple, straightforward approach, Best Year Yet helps individuals and businesses achieve their goals by asking a series of simple questions, including:

- **What did you accomplish last year?**
- **What were your biggest disappointments?**
- **How do you limit yourself and how do you stop?**

- **What roles do you play in your life?**
- **What are your top ten goals for next year?**
- **How can you make sure you achieve those goals?**

Best Year Yet coaches Jinny and Tim Ditzler walked David through the process, helping him to identify his accomplishments, his disappointments and the lessons he could learn from what happened in the past year.

"I realized that I had accomplished some really great things but had never really acknowledged them," explains David. "Once I reflected on all the things I had done, I felt good. I felt re-energized in a positive way."



David McAvoy and Family

The Revelation

David's next task was to guide the "Big Boys" through the process. The Board needed to complete the Best Year Yet workshop and develop its plan for the next year.

"The process was an absolute revelation to us because it was so simple," says David. "We had really convoluted, complex plans in the past. Each year we would take them out of a drawer and dust them off so we could draw up goals for the new year."

David then put all of his managers and sales staff through the process. Many were skeptical, asking if it really was important and if the Region could afford to take the sales force off the road for a day. Some even suggested that the managers filter the process down to the rest of the team.

Nevertheless, David stood firm, knowing he had an unbelievably effective tool in his hands. He insisted that each member of the management team go through the process with the first-hand facilitation of Best Year Yet coaches. "I was determined not to cut corners, and more importantly, not to allow management to dilute the power of this little gem."

David went a step further by actually putting his support team — administrative assistants, secretaries, messengers and others — through the process as well.

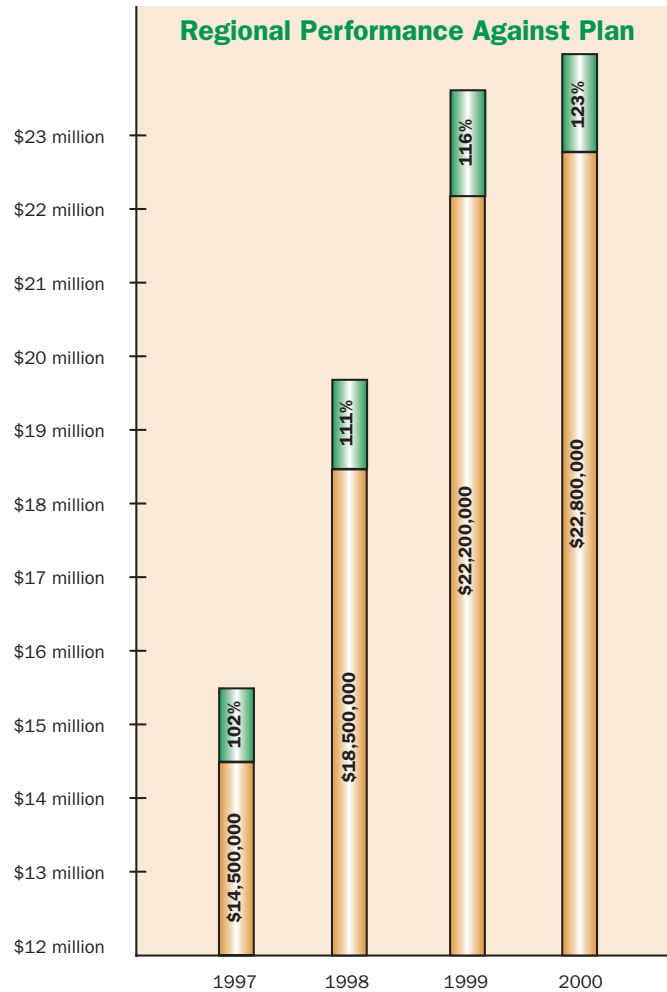
The Best Year Yet process helped to solidify the focus of David's team. "We started to understand each other a bit more and we became more trusting and forgiving," explains David. "It helped turn weak goals into powerful goals with a real purpose, resulting in an increase in productivity."

Bringing Best Year Yet to Life

After completing the process with his team, David realized he needed to bring Best Year Yet to life for the business. "In a moment of madness, I put my personal plan in a frame and stuck it on the door of my office for all to see," he says. This is what David's team and anyone who walked into the office would read:

My Top 10 Goals for a Best Year Yet

1. Deliver target.
2. Spend one day with every manager.
3. Maximize the effectiveness of the campaign and measure improvements.
4. Remove barriers for open communication with all staff.
5. Ensure we live up to the expectations of our investors.
6. Attend my children's school events.
7. Share in Teresa's successes and failures, giving quality time in support of her aspirations.
8. See my parents at least once a month.
9. Exercise three times a week.
10. Take all of my vacations.



"The whole review was very powerful to me," says David. "I was so wrapped up in the business I wasn't thinking about what else was really important."

David's wife, Teresa, completed the plan as well. "It led us to a really interesting conversation," reflects David. "It was quite weird, we'd been married 15 years and I'd never really talked to her about her aspirations. She told me for the first time all the little things I had been doing that really annoyed her, like calling her part time job the 'pocket-money' job."

The experience was a bonding one for both David and his family. "I saw Teresa stretch herself and understand that she could set goals," says David. "For the first time, I wanted to talk about her goals as well."

The changes that Best Year Yet brought about in David made a difference to his children too. "I suddenly started to turn up at their school events. I couldn't believe how shocked they

"I felt a bit naked with all my guidelines and paradigms and goals on the wall. But in a weird way it was strangely satisfying."

David's staff also made sure that the bottom of every single piece of documentation that left the office, including faxes, memos and newsletters, stated, This is our Best Year Yet! "By including this important declaration, even those who hadn't been through the process yet began to get excited about what Best Year Yet was doing for the team," explains David.

The Family Side

Best Year Yet asked David questions about his home and family too — issues he hadn't seriously considered before, such as:

- What do you want out of life?
- Do you have a plan?
- Does that plan involve home?
- Where are you spending your time?
- Do you value yourself?

were," explains David. "I suppose I hadn't realized how important it was to them."

David, Teresa and their daughters reviewed their plan, celebrated their successes and even started to go to the gym together. "Quite simply, I started getting the balance right and started to feel quite good."

The Rise to the Top

Results began to surface on the business side as well. In less than two years David's Region quickly rose from last place to the top Region of the year. "We were unstoppable. We became the first Region to deliver 100% plus performance and the first to break even against cost. Our performance was absolutely fantastic," exclaims David. "And for the next four years, our performance improved until by the end of 2000, we had achieved 123% of an ever-increasing plan!"

"I believe we were successful because we were all achieving our personal goals," he says. "As a result, the morale and motivation of my staff went through the roof."

To David, the most satisfying outcome of all was the results of that year's Staff Satisfaction Survey. Satisfaction had increased from a low of 41% in 1996 to 92% in 1997, the highest score the Region had ever attained.

David is thrilled that his team followed along with him. "It meant that each and every one of them had achieved their best year yet," he says. "And, that meant that the business had achieved its best year yet too."

The Results

The results prove that Best Year Yet was worth the investment of time, energy, and hard work for David and his team. "I honestly do not believe that we could have tackled our situation if it hadn't been for the Best Year Yet system," says David.

As the rankings of the Region demonstrate, its achievements weren't just a fleeting success for David and his team. Since 1997, David's team has knocked the company's long-time leader off its pedestal and maintained its status as the top Region in the nation.

When asked if the Best Year Yet process has been worth it for the business, David lists off some incredible results:

- **Rose to top Region within 2 years**
- **Added \$7 million to the bottom line during the first 2 years**
- **Income of sales staff grew 87% over a 5-year period**
- **Eighty percent of Regional Managers moved on to senior roles in the group**
- **Staff satisfaction increased from 41% in 1996 to 92% in 1997 — the best score of the Region ever**
- **Became the first region to deliver 100% plus performance and break even against cost**
- **Created a real performance culture**
- **Held monthly coaching for sales director and team**
- **Learned to focus on results**
- **Attained alignment and teamwork**

"The cost of Best Year Yet doesn't even register when measured against the gains," says David. "It is insignificant

when you look at what it delivered to me and my team."

David is proud of the personal results that the process has made possible as well:

- **He and Teresa are stronger than ever**
- **His children, Emma and Hayley are great kids**
- **He was asked to join the Bank's Executive in July 2001**
- **He was appointed Regional Managing Director and now runs the South of England for the #1 financial services organization in the United Kingdom**
- **He oversees 254 retail outlets and a staff of 4,000**

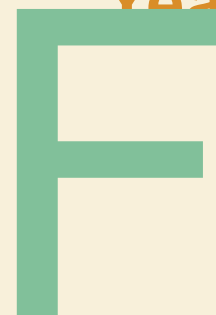
David's new role as Regional Managing Director brings a familiar set of frustrations — good people, excellent product, huge customer base and poor results. "I'm off on the road to success again." However, this time, he says he will be so brilliant in his thinking that people are going to want to know how he did it.

"I am ready on a personal basis," he explains. "All I need to do now is bring the Best Year Yet system to the Retail Bank. It's not any different than before. It's just on a bigger scale."

Best Year Yet is not complicated, says David. "All the program asks of you is to do it and keep doing it. The results from my team speak for themselves — we moved from last place in the country to first in the highly challenging environment of sales and service. Best Year Yet played a big part and will do it again as I take on a new and much bigger team."

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How to Give your Organization its Best Year Yet



For more than twenty years, the Best Year Yet system has helped individuals, teams

and entire organizations from around the world produce RESULTS year after year. Best Year Yet is an annual planning and implementation system designed for leadership teams that want focus, alignment, accountability and breakthrough.

The program consists of three basic components:

- **Best Year Yet for management teams or departments** — A one day program that works with a group to create an annual plan.
- **Best Year Yet for individuals** — A half-day workshop where participants create their personal one-page plan.
- **The Follow-up system** — Follow-up coaching and monthly check-in to support the team in meeting the goals set out in their Best Year Yet plans.

To learn more about how the Best Year Yet system can move your team or organization to the next level — or to find a workshop in your area, visit www.bestyearyet.com.