



Getting Granular with Big Fives



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Objective of Getting Granular

Getting Granular with Big Fives

Big Fives need to be _____.

Ask yourself: “ _____?”

Will the Big Five work? Are there sensible linkages between the topic and actions?

Have the team challenge each other on the Big Five actions.

Take the approach of “ _____.”

- You are not attacking the person, but the idea. For example, will smiley faces on customer appreciation day increase net worth?
- Really listen to what is being said. Don't accept “ _____ ” changes which really don't change the outcomes. They just provide a quick resolution, not a long-term solution.

Strong examples include What, How Much or How, and By When.

- Weak outcome of a Big Five – *Inspect What You Expect*.
- Strong outcome of a Big Five – **Inspect What You Expect at noon and 4:00 p.m. every day with respect to actions and results from teleconsulting for all team members**.



Examples of *Granular Big Fives* for Managers

Weak Outcome – Coach Them

Strong Outcome – Review contact strategies with respect to Opening Lines and Overcoming Objections with each employee, 3 x per week.

What: _____

How Much: _____

By When: _____

Weak Outcome – Listen and Observe

Strong Outcome – Listen to/observe telephone conversations and in-person meetings with each employee, 2 x per week.

What: _____

How Much: _____

By When: _____

Weak Outcome – Provide Feedback

Strong Outcome – Role-play skills based upon listening/observing, 3 x per week.

What: _____

How Much: _____

By When: _____



Weak Outcome – Provide Good Lists

Strong Outcome – Assess the appointments set from provided lists, analyze objections, and provide recommendations, 3 x per week

What: _____

How Much: _____

By When: _____

Weak Outcome – Identify Best Practices

Strong Outcome – Identify *Proven Best Practices*, cross-pollinate to those performing below 50%, and get an Action Plan from the team for immediate implementation daily.

What: _____

How Much: _____

By When: _____

Weak Outcome – Help Them to Properly Create an Interest

Strong Outcome – Have the team Role-Model the specific “Creating an Interest” approach they have used with key products over the last two days. Provide feedback and rehearse weekly.

What: _____

How Much: _____

By When: _____





Focused Performance Meeting Big Five Weak vs. Strong

What are the five most powerful actions you can take to increase the number of needs met through conducting a Financial Review?

Weak	Strong (What, How Much, By When?)

What are the five most powerful actions you can take to increase the number of appointments set through teleconsulting?

Weak	Strong (What, How Much, By When?)



What are the five most powerful actions you can take to ensure tellers/universal bankers/bankers reach their referral goals?

Weak	Strong (What, How Much, By When?)



Keeping Weekly Focused Performance Meetings Alive



The Five Most Powerful Ways to Keep Weekly Focused Performance Meetings Alive

Develop Your Ideas

Group Ideas

Group Big Five

1.

2.

3.

4.

5.

Have Fun

