

By Norm Trainor

Assigning Tasks: QQT/R

The following is based on one of The Covenant Group's clients, Robin Froner. All of the names and telling details have been changed to preserve client privacy.

Over the past year, Robin Froner had been transforming herself from salesperson to business builder, and her business had grown tremendously. To ease the transformation and ensure her company stayed the course of her ambitious projections, she'd been adopting some key management practices. But when Jamie, her investment specialist, bungled plans for a key client event, Robin realized there was something wrong in her business.

Robin had been pleased with Jamie's job of running the investment side of the business, and had figured she could easily trust her with the client event. It shocked her to discover Jamie hadn't pulled through; in fact, it made her rethink her perception of Jamie altogether. She'd encountered similar problems with other staff members, and was growing increasingly concerned. As she had in the past, Robin called on Herb Koplowitz, our vice president of organizational effectiveness services, to help. The meeting turned out to be quite an eye opener for Robin; she was surprised to find that the source of her problems didn't lie with Jamie or the other staff members, but with herself, and specifically with how she was managing them. Fortunately, Herb pointed out to her that the mistakes she was making were common, and the solution simple.

Robin had begun her meeting with Herb by telling him about the client event fiasco. She had asked Jamie to organize an upscale luncheon to introduce their services to a select group of clients. A week before the event, Robin had asked Jamie for an update and discovered that a large number of key clients hadn't been contacted about the event, and furthermore, many weren't even on the invitation list. Robin was furious; without the right people there, the whole thing would be a waste of time and money. When Robin asked Jamie to explain things; Jamie told her it wasn't one of her priorities; she was busy working on a number of other projects that she saw as essential to reach her growth targets. In fact, to Robin, she seemed unduly stressed

about meeting her goals. When Robin probed further, she discovered that Jamie had been furiously working toward an unrealistic goal of increasing investments by 50%. Robin was stymied; she'd made Jamie responsible for a substantial increase in investments for the coming fiscal year, but she had in mind 20%, not 50%. What puzzled Robin was that the client event was supposed to help Jamie; but Jamie was too blinkered by her own unrealistic targets to see how the client event fit in. And furthermore, the event was meant to support other corporate targets, not just Jamie's. Robin had specifically wanted Jamie to partner with Sandy, her benefits specialist. Jamie hadn't even approached Sandy because she thought Sandy was too busy. Robin was annoyed at this excuse; Sandy was busy, but one of the company's key strategies was increasing the number of products that each of their clients held.

Herb was beginning to understand the problem. To probe further he asked a couple of pointed questions. He asked Robin how much she'd asked Jamie to increase investments. Robin answered that she said she was expecting a significant increase. Then Herb asked if she'd specifically instructed Jamie to partner with Sandy for the luncheon. Robin answered no; she'd figured Jamie would have known to do that, considering their multiple-product strategy.

Those were the answers Herb was expecting. He then told Robin that the frustration she was experiencing had to do with QQT/R. When you assign a task, you and your staff member need the same understanding of the quantity and quality they will produce, the time they'll do it by, and the resources they will use. QQT/R, a concept developed by Elliott Jaques, stands for quantity, quality, time and resources. Jamie wasn't the problem; the problem was that Robin wasn't applying QQT/R when she assigned tasks and the result was frustration and chaos.

Robin wanted an increase in the quantity of sales and Jamie understood that, but not by how much. That's the first 'Q': quantity. The second 'Q' is quality. Herb said to Robin, "I know you have definite quality standards around issues like only selling clients what will be in their best interests, but was there anything else in particular about the quality of Jamie's sales that was important to you?" "Actually, I didn't want these sales coming from just anywhere," said Robin. "I wanted half of the sales to come from my own Top 20 list of clients, and I wanted those to be accounts of a minimum of \$250,000. The other half should be accounts of at least \$100,000 from Sandy's benefits clients. But is it always that easy to specify the quality I want?" "No," Herb answered. "Consider the psychographics of your client base. Psychographics are qualitative. Even though you can't specify or measure those qualities exactly, you can certainly describe them well enough for someone else to understand."

"Next comes 'T' for time," said Herb. Jamie's targets were specific: end of the fiscal year. But some of the other problems Robin experienced had stemmed from unclear timelines. Robin had frequently asked Leslie, her admin assistant, to do something urgently, only to be disappointed not to receive it within the hour. Robin now realized that 'urgent' didn't communicate a clear time. To Leslie, urgent meant first thing tomorrow morning. "But what if she doesn't think she can do it in an hour?" asked Robin. "Good question," said Herb. "Once you're done with assigning the whole task, you need to get Leslie's advice. Does she think it's too much to do in an hour? Does she think you'd be better off with her doing a different task? You don't have to accept her advice, but you'd be foolish not to ask for it and consider it. Also, by talking about it with her you'll get a better idea of whether she understands clearly what you want."

"That brings us to 'R' for resources," Herb said. "You don't always have to mention resources if there aren't any special resources to use in the job." Robin said, "But I did want Jamie to use me to help her get sales from my Top 20 list and I wanted her to use Sandy to help her get business from our benefits

clients. And I certainly wanted Jamie to utilize Sandy for the client event. I can see that it would have helped for me to be explicit about these as well."

Lesson Learned

In her session with Herb, Robin realized that she'd set herself up for disappointment and caused much unnecessary chaos by assigning tasks that were too vague. She liked the idea of applying QQT/R, but still had some concerns. Wouldn't being so specific stifle creativity? Herb answered that it doesn't foster creativity to pretend that the task is open-ended and then to criticize someone for not meeting the standards you had, but didn't tell them about. The creativity is in how someone gets the task done to your specifications. If that doesn't give them enough challenge, and if they don't find enough challenge in other tasks you've assigned them, then maybe it's time to see if you can find a bigger role for them. If you can't, it's their choice whether they want to stay in a job that doesn't make full use of their capability.

Robin had one last concern. "Won't someone like Jamie resent it if I give her so specific an order?" "Remember," Herb said, "that you pay Jamie to work on the tasks you need done for your strategy. Jamie needs to understand that as well. It would be disrespectful if you didn't ask for and consider her advice about the task, but it's not disrespectful for you to tell Jamie what you want done. If she's not willing to do what you're paying her to do, I'd say she's not the employee you need."

Soon after her session with Herb, Robin was seeing the benefits of QQT/R. Her staff was less frustrated, she wasn't experiencing the type of surprise disappointment she'd had when she uncovered the problem with the client event, and she had substantially greater confidence that everyone was on track working on her strategy.

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