

Dos and Don'ts of Using Branch WFM to Drive Sales

✓ Create a true branch sales capacity plan that factors in historical volumes AND sales goals.



✗ Build branch capacity forecasts based solely on historical volumes.

✓ Align sales staff and incremental sales behaviors to market opportunity.



✗ Take a one-size-fits-all approach to branch staffing.

✓ Schedule sales activities to ensure proper preparation and sales execution.



✗ Rely on the honor system for business development.

✓ Capitalize on digital appointment booking across channels to drive sales.



✗ Overlook the power of appointment booking.