OUTCOMES

150+
Recommendations to Optimize Their Organizations

10
Efficiency and Effectiveness Levers Assessed and Scored

NEW
Plan and Roadmap to Optimize the Sales Organization

Improving Sales Efficiency and Effectiveness

Problem
Our client had an underperforming sales organization and they wanted a firm to assess the current state of their sales organization and make recommendation for improvement.

Solution
A clear picture (via a heat map) of the client's current state was developed through a series of detailed interviews, senior management discussions, and client data and documentation. The information was gathered then organized and summarized by utilizing our 5 key levers for Sales Effectiveness and our 5 key levers for Sales Efficiency.

Based upon their current state and where they wanted to take the organization, over 150 recommendations were developed. To focus the organization on the most important recommendations, we used Company Expert's scoring methodology – e.g., cost, impact, and execution confidence to further define and prioritize the list and sequenced these recommendations in a 2-year roadmap

We sequenced in the smaller list of recommendations into a multi-year roadmap.

Outputs
- Sales Maturity Curve
- 150+ Recommendations That Were Scored and Sequenced into a Transformation Roadmap
- Assessment and Heat Map of Their Sales Efficiency and Effectiveness Levers
- Interview and Survey Summaries
- Deep Analytical Reports to Help Inform the Roadmap
- Current State Assessment With 5 Major Key Themes

SALES

TECHNOLOGY CONSULTING FIRM
This firm provided consulting to mid to large companies looking to move and integrate their infrastructure and applications in the cloud

CASE STUDY

OUTCOMES

12X
Increase in Qualified Pipeline Leads

80%
Reduction in the CEOs Time Dealing with Sales Related Activities

NEW
Compelling Sales Materials, Web Content And Proposals

Building a Sales Team to Accelerate Growth

Problem
Our client, the CEO of a technology consulting company, was looking to double revenues and achieve $5+ million in new sales within 18-24 months. Our client was acting as both the CEO and the primary salesperson, severely limiting his ability to grow the business. The CEO needed to build a sales team along with the accompanying sales processes in order to develop a robust sales pipeline of new logos as quickly as possible This organization had an underperforming sales organization and they wanted a firm to assess the current state and make recommendation for improvement.

Solution
This project was delivered in two phases to generate sales revenue as quickly as possible. The first phase developed the necessary foundational requirements for building out the sales team so that once it was established, it would run efficiently and effectively. This included establishing sales processes, governance and metrics, developing job descriptions, corresponding sales compensation plan, and a sales segmentation model that prioritized every prospect within the client's target market.

Phase two of the engagement consisted of the client outsourcing the entire sales management function to Company Expert. Once the sales organization was mature enough, the team was transitioned to the newly hired sales manager.

Outputs

- Recruited and hired three highly effective Sales Representatives
- Established the sales processes, governance structure and reporting capabilities
- Enhanced the sales tools and created marketing materials
- Trained sales reps to increase their effectiveness in closing new business as quickly as possible
- Created a target list that Identified and prioritized the client's best prospects and opportunities for growth
- Acted as interim Chief Sales Officer and developed the sales plan

SALES

CYBERSECURITY RECRUITING CONSULTING FIRM
This firm provided recruiting and consulting to mid to large companies looking to achieve Cybersecurity designations – e.g., CMMC, ISO 27001

CASE STUDY

OUTCOMES

45
Recommendations to improve their sales in the Government space

PARTNER
Establish a partnership with an established Government provider to help generate sales

NEW
Diversified their revenue stream outside to the B2B space

Develop a Go-To-Market (GTM) Strategy

Problem
Our client received an 8(a) designation from the US Government and wanted to build a strategy to pursue government contracts. The client knew little about the market and lacked strategic and selling insights in the government space.

Solution
Company Expert brought the firm through our proven GTM strategy:

- GTM purpose and objectives
- **Who**: Target market and personas
- **What**: Service offering
- **Why**: Positioning of the firm
- **How**: Sales strategy and plan
- **When**: Timing
- Optimizing the cycle with KPIs

Outputs
- Compelling value proposition
- Government target personas
- Key selling messages
- Sales segmentation was performed in the Government space to identify the best opportunities
- Developed a three-year GTM roadmap

OUTCOMES

24

Recommendations were made to improve their sales maturity

STRATEGY

A clear strategy on how to improve their overall sales

NEW

The client was so pleased with the outcome they wanted to duplicate the process on another software business they developed

Sales Assessment and Strategy

Problem

This client wanted to grow its revenue. They had some growth, but they want to put a selling system in place with repeatable, scalable processes to generate predictable revenue.

Solution
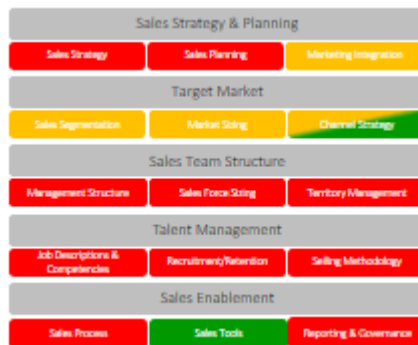
Current State: Assessed the 18 different drivers of sales growth. Developed 6 pages of observations and recommendations.

Future State: Documented their vision of where they saw the firm 1-3 years out.

Roadmap: Developed 24 recommendations on how to fill the gap between the current and future state. Sequenced the recommendations over a 90 day period using 3-30 day sprints

Outputs

- Firm was benchmarked to the industries sales maturity curve
- Recommendations were sequenced based on impact, costs, and effort
- Developed a target market strategy
- Created key selling points and value proposition
- Developed clear differentiators and areas to mitigate against in selling situations

SALES

ASSESSMENT CONSULTING AND SOFTWARE FIRM
Talent assessments, succession planning, executive coaching, and leadership consulting services and software to help organizations develop strong performers.

CASE STUDY

OUTCOMES

25
Recommendations were made to mature their account management strategy

STAFF
Staff was trained on how to be an effective account manager and develop account management plans
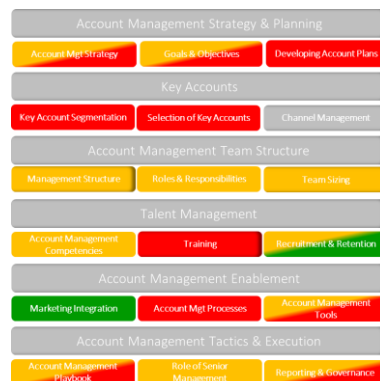
STRATEGY
The client was equipped with both tactical and strategic insights to grow their client relationships and revenue

Account Management Strategy

Problem
Our client had an existing sales team. However, they felt they were missing a huge opportunity to grow their existing relationships with major corporations, educational institutions, and government agencies.

Solution

- Assessed their account management strategy, which resulted in 25 recommendations
- Developed their sales and account management revenue plan
- Developed a 90-day plan with 3-30 day sprints to implement the plan to meet their goals

Outputs

- Account management heatmap of the 18 different capabilities
- Account management plans for small and large accounts
- Account management playbook
- Account management segmentation and service alignment
- Sales, Service, and Account Management RACI
- CRM assessment and recommendation
- Account management compensation and incentives