

ORGANIZING AND OPTIMIZING THE SALES EFFORT

WITH A MEASURED APPROACH FOR LEAD GENERATION.



A large, vertical image on the left side of the page showing a close-up of a red car wheel. The word "BACKGROUND" is written in large, white, bold, sans-serif capital letters across the center of the wheel.

BACKGROUND

A 10 million dollar, family-run electroplating and metal finishing firm, ABC Co. has built a broad and sophisticated client base across a diverse range of vertical markets. Over the past 60+ years, it has become a leading provider of durable and sophisticated metal finishes for the jewelry, aviation, automotive, high tech, and other high profile industries. Based in New England, its business and reputation has been built on an effective combination of advanced technology, incisive R&D, superior quality and outstanding service.



CHALLENGES

Despite a stellar reputation earned while serving an enviable roster of well-known brands, ABC Co's revenue growth had flatlined over the past few years — with diminishing returns on existing business. More focused on the production and technology side of its business, the company had not placed much emphasis on sales. The sales force found it difficult to articulate the company's strengths and value proposition to both current customers and prospective clients. In addition, ABC Co. was relying on outdated sales materials, sporadic and uncoordinated new-business efforts, and the antiquated practice of cold-calling.

What's worse, the lines between sales and production were blurred, with neither department having defined roles. The sales team had no specific sales goals or formal meeting structure in place. They were frequently pulled away to answer order inquiries, handle production problems, and make deliveries. On the other hand, the production staff often handled customer relationships and answered client questions. This confusion created redundant processes, overlapping roles and gaps in the customer-care lifecycle.



SOLUTIONS

Optimizing the sales force to drive new business.

From our experience, we know it's pointless to spend valuable dollars to generate leads if you can't close the business. This is especially true since sales is often the most expensive marketing channel an organization has. In order to establish a focused and consistent sales channel for ABC Co., TribalVision recommended an operational realignment with clearly defined roles and tasks for all sales and production personnel. In fact, an entire section of our marketing plan was dedicated to strengthening the sales function. Key elements in the process for this sales optimization included:

- Intensive discussions with company stakeholders to assess the sales force's needs and responsibilities
- A series of sales and production responsibility meetings to implement a new organizational structure — along with new processes to reallocate tasks and streamline the efforts for both functions
- Deployment of the appropriate sales tools to contact new business leads and to enhance existing customer relationships
- Development of a “playbook” for the sales manager to use as a guide to lead the sales team
- Establishment of a new customer support staff position. This enhanced overall responsiveness for the company, while freeing the sales team from the time-consuming process of customer support
- Introduction of clearly defined metrics for sales including key performance indicators (KPIs), a sales status dashboard, and a detailed outreach strategy for prospects and existing clients
- A deep dive into ABC Co's custom database to identify key accounts for the sales force to proactively up-sell and cross-sell existing and new products to
- The buildout of a new business development strategy that served as a clear roadmap for the sales team to intelligently and efficiently generate new business opportunities



Sales force improvements positioned for growth

What began as a marketing exercise led to a total sales force realignment and optimization. Due to more clearly defined roles and responsibilities, the ABC Co. sales team now has pre-defined goals to strive for, a structured roadmap to follow, a distinct and consistent company story to relay to clients and more time freed up to proactively sell versus troubleshoot. The sales force — ABC Co's most expensive lead generation channel — is now much better positioned to strengthen existing customer relationships while finding and converting new business opportunities.

Specifically, the new structure:

- Has helped ABC Co. break through its sales plateau and realize one of the strongest years in recent history
- Freed up 15% of the sales team's days for new business development efforts
- Enabled the sales team to realize 20% more touch points with prospective clients and 15% more cross-sell/up-sell touch points with existing clients
- Fostered a greatly improved customer experience with a consistent point of contacting, resulting in positive client feedback

