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# Case Study

## Optimizing the Sales Effort with a measured approach for lead generation

### Situation

A multi-million dollar, family-run electroplating and metal finishing firm, Company X has built a broad and sophisticated client base across a diverse range of vertical markets. Over the past 60-plus 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, Company X's revenue growth had flatlined over the past few years — with diminishing returns on existing business. It was also losing new business opportunities to smaller, less-capable firms and low-price offshore manufacturers. Always more focused on the production and technology side of its business, Company X had never placed a great deal of emphasis on sales. The sales force found it difficult to clearly articulate the company's strengths and value proposition to both current customers and prospective clients. In addition, Company X was relying on outdated sales materials, sporadic and uncoordinated new-business efforts, and the antiquated practice of cold-calling. Due to a variety of internal factors, a changing client base, and agile competition from across the globe, this was no longer an effective strategy for growth.

### **A fragmented sales force with little real-world experience.**

As is the case with many established organizations, institutional inertia was leading to sub-par performance from several departments. These performance issues were most notable in the sales department. This was staffed by product experts with no true sales experience who had been promoted into “sales” roles — with an hourly-wage marketing assistant handling much of the day-to-day sales work. Not surprisingly, they were finding it difficult both to convert new business leads and to win additional business from existing clients. What's worse, the lines between sales and production were extremely blurred, and neither department had 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 even make deliveries. On the other hand, production people were often handling customer relationships and answering client questions. This confusion had created redundant processes, overlapping roles and gaps in the customer-care lifecycle.



### **A comprehensive plan for sustainable lead generation.**

Company X had never developed a comprehensive marketing strategy at any point in its longstanding history. Yet, this is exactly what the company needed to move its business to the next level and achieve real sustained growth. Beginning with our customary deep-dive discovery process, TribalVision functioned as Company X's outsourced marketing department. Our team dissected the information from this discovery phase in order to:

- Create an overarching vision of where Company X needed to go. This became the guidepost for the entire strategic and tactical effort.
- Revamp the company's brand/product messaging to properly communicate its key differentiators — and to ensure consistent top-to-bottom brand communication across the organization.
- Apply the revamped brand/product messaging to key assets including interactive and email marketing vehicles
- Identify internal issues and realities that were keeping Company X from realizing its full potential

### **Defining distinct roles for sales and production.**

From our experience with a variety of businesses, 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 Company X, 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/production realignment included:

- Intensive discussions with company stakeholders to assess their needs and responsibilities
- 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
- 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
- Establishment of a new customer support staff position. This enhances overall responsiveness for Company X, 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

## Results

### **Company-wide improvements that reach beyond marketing.**

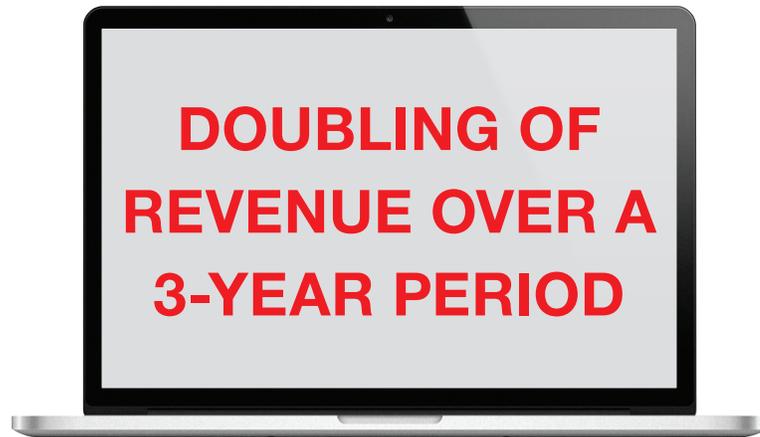
For Company X, what began as a marketing exercise led to a complete organizational restructuring, realignment, and optimization. This is a valuable example of TribalVision’s ability to address a wide range of external and internal issues to formulate a strategic plan that is both comprehensive and results-focused.

Due to better definition of roles and responsibilities for sales and production, the Company X sales team has more time to tell the story of the value of the brand, the attributes and benefits of various



products, and about the company's overall capabilities. The sales force, Company X's most expensive marketing channel, is now optimized to strengthen existing customer relationships while finding and converting new business opportunities.

With a marketing plan and streamlined organization in place, TribalVision has positioned Company X to grow and compete in today's global marketplace — with the tools and knowledge to successfully adapt to new challenges and opportunities. As a result of these efforts, our client has more than doubled its top-line revenue over the past three years and has signed on 50+ new clients.



#### About TribalVision

As an outsourced marketing department for hire, TribalVision's mission is to help companies grow. This is achieved by combining intelligent strategy with tactical execution in a hands-on, results-driven manner. TribalVision utilizes its clients' marketing budgets as efficiently and intelligently as possible — ensuring that each dollar spent maximizes awareness and generates new business. TribalVision's unique marketing model is designed to fully align interests with client outcomes — guaranteeing an objective, client-first partnership. This is demonstrated in the firm's fee-based compensation structure, "roll up your sleeves" mindset, metrics-driven approach, and role as a trusted marketing resource tasked to help navigate organizations to higher grounds. To learn more about TribalVision, visit [www.TribalVision.com](http://www.TribalVision.com).

