



## CASE STUDY

# DESIGNING THE OPTIMAL SALES PROCESS

An Achievable 12-Month Roadmap Balances Pragmatism and Vision

TRANSFORM

### THE BUSINESS CHALLENGE

This client had a very happy problem: following significant success, their primary security **solution was being added to the stack of a Tier 1 technology provider**. In an instant, the demands on their people, processes and technology ramped up exponentially. While they would find a way to meet demand in the short term, they knew they had **specific long-term challenges, including customer care and the capture and management of metrics**. Where else should they apply improvement focus? How could they get a layered view of what had become an opaque sales process? What did they really want their growing organization to look like in two years? Leadership needed help to design and stand up a best-practices sales process.

### AGSI'S HIGH-LEVERAGE SOLUTION

From the beginning, AGSI emphasized that this initiative was not about our client's IT or CRM; it was **a business transformation initiative** and would need a concordant level of change. Using our proprietary BT3™ methodology, we **mapped their current state** (including all processes, roles, tools, levels of automation and bottlenecks); **developed a future-state vision** (capturing leadership requirements and identifying human capital and technology necessary to achieve them); **defined gaps** between the two states; and **developed a clear roadmap** to close the gaps and support the vision.

Our **current-state analysis highlighted significant surprises and concerns**, including variability of their processes by region, channel and sales team. There were also great differences in process maturity, their performance metrics were variable and not automated, and there were far too many manual interfaces. In the vision-capture stage, **leadership laid out aggressive goals** that included achieving 90% of their sales through non-direct channels. With these goals and our gap analysis as the foundation, **we identified multiple approaches and performed real-world simulations to validate** viability. This data became the basis for AGSI's roadmap to their future-state sales process. And we were able to maximize our client's ramp-up by **working across the organization to boost success**, for example talking to Legal about how contracts should change, to Finance about how projections should be managed, and to HR about the new skills and recruiting process required.

### VALUE TO THE ENTERPRISE

Our client received a **pragmatic 12-month roadmap** that's been successfully implemented. They're now **able to effectively manage their channel sales process, incentivize performance throughout the enterprise, and maintain end-customer relationships**. Their new process, as designed and validated in our simulations, enables a **30% reduction in the projected cost to support a 3X increase in sales**, compared to the cost trajectory of their previous state. The new design also yielded a **1,167% increase in workflow automation**, as well as improved system support and recordkeeping for the remaining manual tasks. Our client now has the transparent and transformative sales process they envisioned.

### IN BRIEF

#### CLIENT:

A leading provider of Technology Network Security

#### ENGAGEMENT:

Sales Business Process Design

#### CHALLENGE:

Create and implement an optimal sales process that not only can scale quickly in the face of a significant new business opportunity but also support leadership's vision for extensive organizational change

#### OUTCOME:

A growth-focused new process is laid out in a 12-month roadmap that aligns every area of the business, creating a best-practices sales ecosystem that leverages greater productivity and still promotes hands-on relationship management