

REGION-WIDE SOLUTION

standardize sales process and performance

Technology and services company in multiple Latin America countries with \$500M annual revenue

CLIENT'S SITUATION



- ☑ Lack of region-wide sales standards or best practices across Central America, Ecuador, Peru, Chile, Colombia and the Caribbean
- ☑ No visibility to region pipeline despite forecast-centric operating mode resulted in lack of confidence from corporate finance
- ☑ Heavy use of manual, individual spreadsheets by sales management and therefore no standard process and definitions

THE SOLUTION



Sales Outcomes deployed a full solution for sales coaching, standardization of sales process and performance monitoring. Key services we performed included:

- ☑ Coaching sales leaders to effectively drive standard pipeline, forecast and opportunity management process and methodologies
- ☑ Sales process improvements and simplification
- ☑ Salesforce.com standardization and adoption by all countries, including common terminology and key performance indicators (KPI's)
- ☑ Created Salesforce.com reports and dashboards for sales pipeline and performance, including coaching managers on how to use them

Coaching and performance monitoring resulted in a dramatic clean-up of 2,500 'fake' deals in the pipeline. Establishing the same terminology, standards and best-practices region-wide means management is now much more confident in predicting results.

OUTCOMES



- ☑ 99% achievement of targets in first two quarters after engagement, from more accurate, predictable forecast
- ☑ 83% reduction in deals stuck in the same stage
- ☑ 87% reduction in Salesforce.com data quality issues
- ☑ Eliminated 30 hours of administrative meetings/month, while increasing forecast accuracy and reliability, via automated interfaces or report links