



“We believe that the only way to make the right long-term changes in a business is to have a true understanding of our clients’ current situations.”

## What is the CONSULT phase?

**Clear direction and focus on how to achieve business objectives.**

**Internal engagement and buy-in from all of those involved.**

**External validation of the competencies and capabilities.**

“80% of our sales are now coming through people who were not in the original 80%.”



“The single biggest difference with using SBR is their approach to how we listen to our clients. SBR really tailor what you’re doing for them, according to what your needs are. You learn how to quiz clients in the right way. I think that’s been the single most important habit that has gone right through our business.”

**Sebastian Chambers** *Managing Director of CIL*

### Deliverables

- A sales capability report (SCR), will be documented and presented, including:
- ✓ Audit on your current sales capability, including, **strategy, structure, processes and methodology.**
  - ✓ **Benchmarking of current sales competencies** exhibited against industry and market best practice.
  - ✓ Project blueprint on relevant activity and deliverables to **achieve business objectives.**
  - ✓ Recognition of areas of success to be replicated, maintained and encouraged.
  - ✓ Quick wins and recommendations that RLB can immediately and independently implement resulting in **immediate ROI.**

### Benefits

- + The report and insight will ultimately provide **external validation of the competencies and capabilities**, of the sales team, reviewed against best practices & processes.
- + There will be **clear direction and focus** on how to achieve business objectives, the base from which any programme is built from.
- + In addition to the production of a Sales Capability Report, running this initial phase will ensure we have **internal engagement and buy-in** from all of those involved. This is essential for successful uptake of any programme and achieving tangible return on investment in future phases.

During the **CONSULT** phase our objective is to ‘lift the lid’ on the sales function to provide feedback as to the current state and **what needs to be done to achieve your business objectives** (whether internally or through further support).

This **CONSULT** phase, concludes with the presentation of a ‘**Sales Capability Report**’ (SCR) to the leadership team and key stakeholders.

### Scope

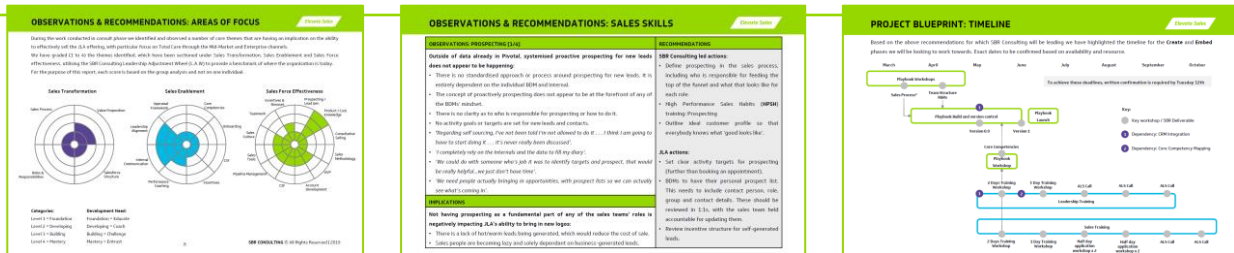
An example draft scope of a **CONSULT** phase for your business is outlined below.

SBR Consulting use our **sales transformation, enablement and sales force effectiveness accelerators** to benchmark current capability, providing a clear view of the organisation's current state.

**Timeline:** Dependent on your resource availability we would expect the consult phase to last 4-6 weeks.

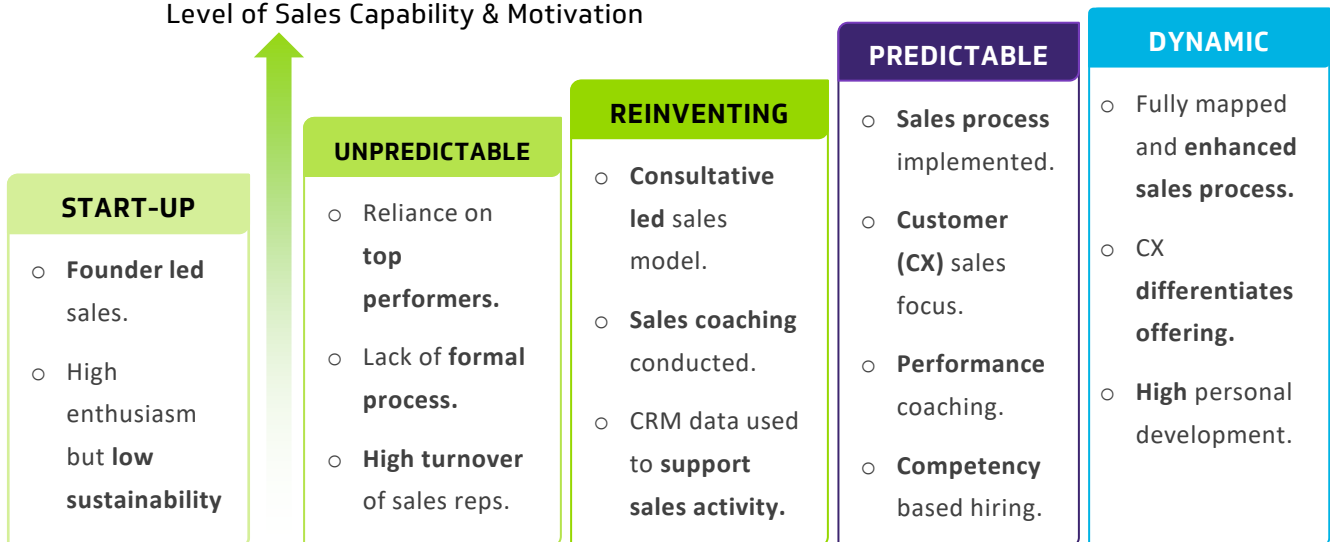
- ✓ Leadership alignment & project planning workshop (Scope, Objectives, Governance, Roles and Responsibilities) with key stakeholders.
- ✓ Data analysis of sales activity and output data.
- ✓ Review and analysis of sales strategy, structure, process and tools/templates.
- ✓ 1:1 semi-structured interviews with sales team and relevant stakeholders from sales, tech, ops, professional services, marketing and finance.
- ✓ Shadowing of client interactions (face to face / phone) NB. where call recordings are available these can be utilized in place of "live" shadowing.
- ✓ Review of existing employee / client feedback and surveys.
- ✓ Conduct relevant additional employee / client surveys.
- ✓ Production of sales capability report.
- ✓ Presentation and review of findings.

[Click here to see some example accelerators](#)



### SALES MATURITY MODEL *Where do you stand?*

Level of Sales Capability & Motivation



The Level of Effectiveness & Efficiency of the Sales Function