



“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 you 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

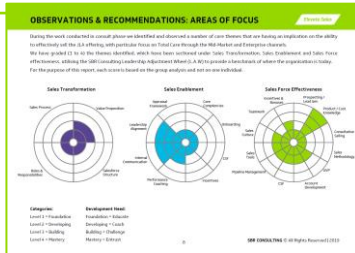
An example draft scope of a **CONSULT** phase for your business is outlined below.

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.

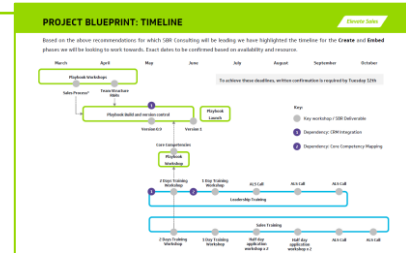
**Timeline:** Dependent on your resource availability we would expect the consult phase to last 4-6 weeks.

- ✓ 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](#)

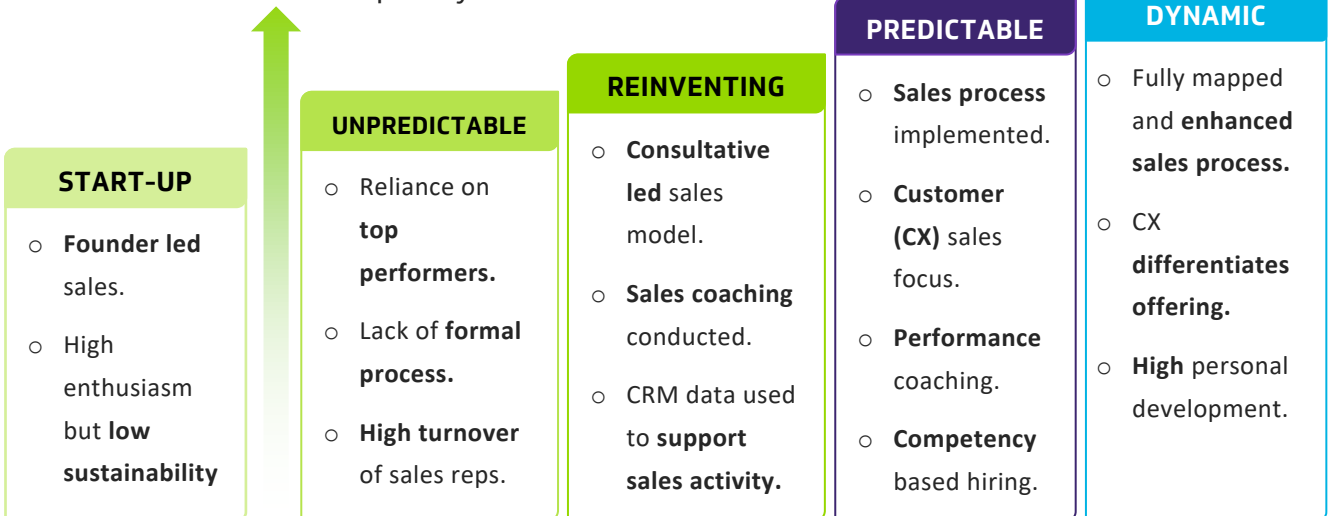


OBSERVATIONS & RECOMMENDATIONS: SALES SKILLS	RECOMMENDATIONS
<p><b>Outside of what already in place:</b> systematic practice prospecting for new leads <b>does not appear to be happening.</b></p> <ul style="list-style-type: none"> <li>There is no standardised approach or process around prospecting for new leads. It is entirely dependent on the individual BDR's skillset.</li> <li>The concept of prospecting does not appear to be at the forefront of any of our BDRs' mindsets.</li> <li>There is no clarity as to who is responsible for prospecting or how to do it.</li> <li>Any activity goals or targets are not set for new leads and contacts.</li> <li>"Prospecting self-learning" has not been taught or not allowed to do it... "I don't even go to how to start doing it... it's never really been allowed."</li> <li>"I completely rely on the internal sales team to do it for me."</li> <li>"We would do with someone who's job it was to identify targets and prospect, that would be really helpful, we just don't have time."</li> <li>"The most major obstacle bringing in opportunities, with prospecting is that we can actually see what's coming in."</li> </ul> <p><b>Not having prospecting as a fundamental part of any of the sales team's roles is negatively impacting SA's ability to bring in new leads.</b></p> <ul style="list-style-type: none"> <li>There is a lack of performance leads being generated which would reduce the cost of sales.</li> <li>Clear targets on generating leads and sales opportunities on business operational level.</li> </ul>	<p><b>SBR Consulting will advise:</b></p> <ul style="list-style-type: none"> <li>Define prospecting in the sales process, including who is responsible for finding the top of the funnel and what that sales rep's main role is.</li> <li>High performance Sales Model (SPMS) training Prospecting</li> <li>Outline ideal customer profile so that everyone knows what "good" looks like.</li> </ul> <p><b>Key Actions:</b></p> <ul style="list-style-type: none"> <li>Set clear activity targets for prospecting (rather than looking at opportunities).</li> <li>There is no time for personal prospecting. This needs to include contact program, role, group and contact details. These should be contained in CRM with the sales team held accountable for updating them.</li> <li>Include incentive structure for self-generated leads.</li> </ul>



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

Level of Sales Capability & Motivation



The Level of Effectiveness & Efficiency of the Sales Function