

# Capturing & codifying a customised sales methodology & playbook

**ABOUT CREDERA:**

A global consulting firm who combine transformational consulting capabilities, deep industry knowledge, and AI and technology expertise to deliver valuable customer experiences and accelerated growth across a broad range of industries worldwide.

**COMPANY SIZE:**

1,001-5,000 employees

**INDUSTRY:**

Business Consulting and Services

**SBR SERVICES:**

Sales transformation, sales performance, revenue growth strategy, sales playbooks & sales guides,

The impact of a sales playbook and behavioural change programme goes beyond just an impact on internal sales effectiveness to also impacting a business owner's ability to attract investment.

## What did Credera want to achieve?

Credera had an established reputation and growth track based on the excellence of their work and the tangible value that they add to their clients. Like many of our professional services clients the leadership team at Credera recognised that alongside their exceptional technical expertise and delivery capability it is essential to build a rigorous, clearly defined infrastructure that supports a sustainable approach to business development.

## What issues were Credera facing?

As Credera continued to grow there was a focus on ensuring that there wasn't a dependency on only senior grades winning work. As part of the development of the consulting team it was essential for them to develop the habits, confidence and capability necessary to create, convert and maximise the value of an opportunity to the client and Credera.

## The results

As a result of the programme confidence and effectiveness have grown across the participants. Beyond that there is now a clearly recognised "Credera Way" that has been captured and codified. The value of this has been shown in recent investment rounds where the ability to clearly demonstrate the investment and development of the process, people and tools that are central to sales has had tangible effect.

## SBR's approach

Following a period of alignment and analysis within the business we produced a capability report which included recommendations for how to bridge the gap between the current and desired state. Working with key members of the leadership and consulting teams through a series of workshops we facilitated the capture, codification and refinement of the process and methodology that underpins the approach to winning work in the form of a playbook and guide.

The playbook has then been brought to life through a series of workshops where relevant skills are developed and honed to maximise customer experience and engagement throughout the business development process.



"Our partnership with SBR has helped us to clearly define how we win work. Now all our team recognise how they can maximise the value that our clients gain from the full range of our capabilities. Beyond the internal benefits to the team we have also seen the value of a clearly defined approach in conversations with our investors."

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**Matthew Neale**

Chief Commercial Officer