



**SALES
XCELERATION**

From Struggle to Success: How Our Proven Process Improved Sales for a Promotional Products Company



Behind every successful business is a motivated, driven business owner—an owner who had always dreamed of being an entrepreneur and living the American dream.

Fueled by passion and adrenaline, these talented business owners can often start a business, wear all the hats, and keep systems running initially as the company gets off the ground.

But eventually, even the smartest and brightest entrepreneurs recognize they can't be an expert on every part of the business. Working in the business instead of on the business takes a toll on them personally and professionally. They spend more time at work than with their families, they feel stressed and burned out, and the business starts to suffer.

They stop hitting their sales numbers. They realize they don't have the right sales team in place or a process for capturing and nurturing leads. They lose one of their few big clients, and the bottom line takes a hit. Or their sales explode, and they don't have systems in place that can scale.

These are just some of the problems our clients face when they engage with Sales Xceleration.

We've helped thousands of companies uncover the causes of their sales challenges and implement a plan that achieves their full potential.

One of those stories is presented below.



Even the smartest and brightest entrepreneurs recognize they can't be an expert on every part of the business

**While the data and details are factual, we have changed the company's name, company location, and name of the sales advisor for confidentiality.*



Meet the Client

Matt was the Founder and President of a promotional products company in Wichita, Kansas. His company provided branded products—such as uniforms, calendars, pens, mugs, and any product you could think of—to companies all over the United States.

His sales team was small but mighty, and Matt was very much a part of the company's day-to-day operations. He generated leads, managed orders from start to finish, led his sales team, and put out fires when issues came up.

But as time went on, Matt realized they didn't have quotas in place for fair compensation plans. He struggled to develop fresh lead generation ideas to bring in new clients. They hadn't identified their ideal customer profile, so he was not focused in his approach. He felt he was being reactive instead of proactive, and he started to question whether he had the right salespeople in place.

Matt was the Founder and President of a promotional products company in Wichita, Kansas.

Matt was a smart and successful business owner, but he was not a sales expert. He tried to identify his company's issues and fix the problems himself. The small business kept pushing forward, and he didn't know what to do to change its trajectory. When his efforts produced little results, he knew it was time to call an expert.



He felt he was being reactive instead of **proactive**, and he started to question whether he had the right salespeople in place.



Meet the Sales Advisor

Elizabeth, a sales Advisor with Sales Xceleration, had years of sales experience and a proven track record. Matt reached out to her to learn more about Sales Xceleration, and she explained the tools, roadmaps, and deliverables at her disposal and how they could help his company achieve its sales goals.

Matt was convinced she had the experience he needed to get control over his sales and move the company forward. They quickly got to work.



Pre-Assessment Client Organization

Elizabeth began their engagement by asking Matt to complete a self-assessment, which would help her understand the sales organization's structure and pinpoint areas that needed improvement.

Sales Xceleration's assessment is divided into four sections, with a series of questions in each category:



Sales strategy:
industry positioning, competitive landscape, value proposition, and points of differentiation



Sales methodology:
sales coverage, sales process, and customer relationship management



Sales analysis:
sales goals and quotas; metrics, reporting, and dashboards; compensation and incentive plans



Sales organization:
sales training, staffing and hiring plans, defined roles and responsibilities



The Plan

Based on Matt's assessment scores, Elizabeth provided a sales plan that detailed exactly what he needed to do to grow his sales. Over the next six months, she worked closely with him and his team to create, build, and implement a systematic, repeatable plan to support his sales efforts.



Elizabeth provided a sales plan that detailed exactly what he needed to do to grow his sales.



Pre-Assessment Results

Matt's most significant opportunities for improvement were in the Sales Methodology and Sales Analysis categories. Here is a summary of his pre-assessment results.

Sales Strategy

In the area of Sales Strategy, Matt's company scored **49** points out of **70** for a below average score. Indicating the company had not defined the overall market, target market, or customer base. They didn't understand their competition, how to differentiate their products, or how to communicate what sets them apart.

Sales Methodology

Out of the **100** points in Sales Methodology, Matt's company scored **14**, a poor score. It was clear the company had not adequately defined a sales process. Meaning the team could not make accurate forecasts or provide clear insights. The CRM (Customer Relationship Management) was not being utilized, making it difficult to understand their lagging indicators (revenue, profit, etc.) or leading indicators (new pipeline growth, brand recognition, growth in new markets, etc.).

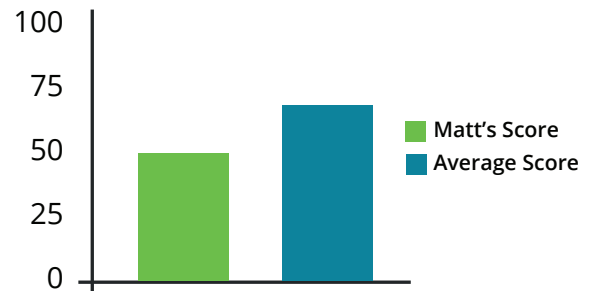
Sales Analysis

Scoring only **20** out of **130** possible points for Sales Analysis, a poor score, it was evident that Matt had not set sales quotas for the company, for each department, or for each salesperson. As a result, he did not have the proper compensation plans in place to incentivize the team to maximize revenue. He did not have the metrics, reports, or dashboards to measure performance so he would know when he needed to make adjustments.

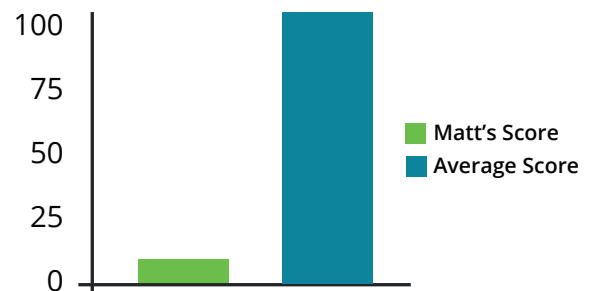
Sales Organization

Matt's company scored **32** out of **100** points in the Sales Organization category, a poor score. The pre-assessment revealed that the team members did not fully understand their role, the expectations of the job, and the consequences of not reaching goals. There was no hiring plan to allow for scalability or to replace a team member without disrupting revenue.

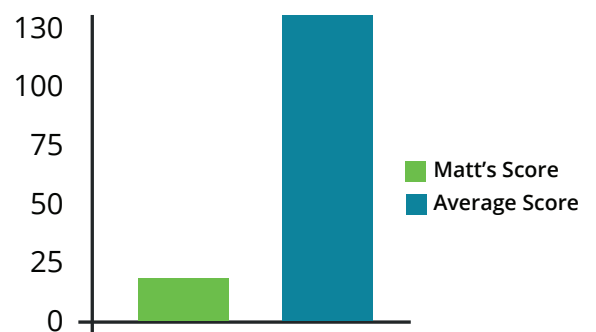
Matt's initial scores are shown below:



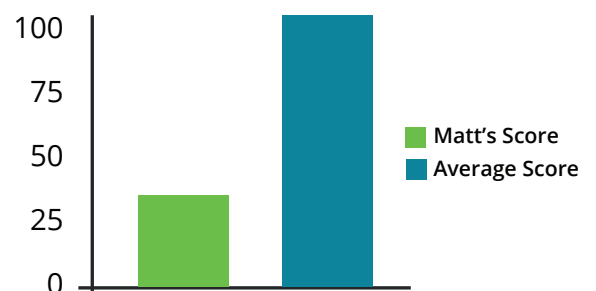
Sales Strategy: 49/70 - Below Average



Sales Methodology: 14/100 - Poor



Sales Analysis: 20/130 - Poor



Sales Organization: 32/100 - Poor



Post-Assessment Results

CONTINUED...

When the plan was fully executed, and the company was running more smoothly and efficiently than ever, Elizabeth asked Matt to re-take the assessment.

Here are his post-assessment results:

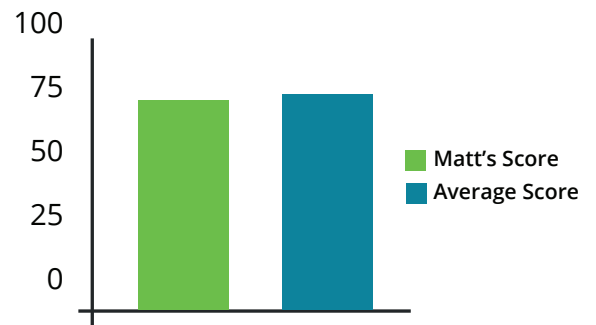
Sales Strategy

Matt's company increased its Sales Strategy score from below average (49 out of 70) to excellent (67 out of 70). With Elizabeth's help, Matt conducted market research to define their market, target market, and customer base, calling on new prospects within and outside their existing markets. They studied their competition, learned what sets their company apart, and created new messaging to communicate their unique selling proposition through their website, marketing collateral, and salesperson communication.

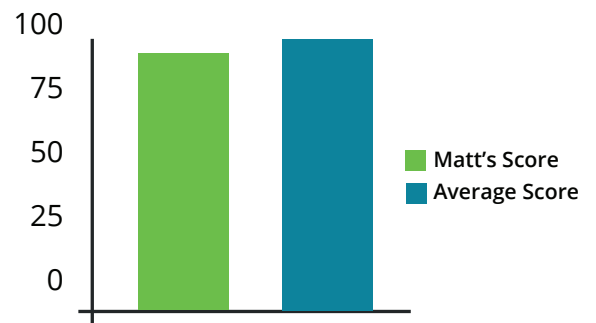
Sales Methodology

While working with Elizabeth, Matt's company did an excellent job optimizing its sales coverage, with no overlap, to maximize revenue potential. They now assign accounts based on account potential and the salesperson who is best suited to be successful within those accounts. They developed a sales process their team understood and was excited about, bringing clarity, accurate forecasting, and keen insights to their efforts. **They learned to use their CRM to gauge their sales team's effectiveness and track ROI to base future marketing spend on their future return.** They created annual sales forecasts and adjusted them based on the pipeline's current performance and future sales. Their Sales Methodology score rose from poor (14 out of 100) to excellent (95 out of 100).

Matt's initial scores are shown below:



Sales Strategy: 67/70 - Excellent



Sales Strategy: 95/100 - Excellent



Post-Assessment Results

Traction - Monthly

20%
MoM Growth

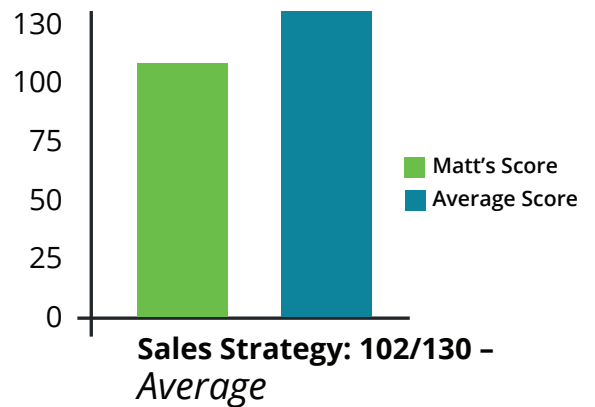


All personnel have real-time insight into current sales performance and understand what the results mean. They are updating their compensation plans at the beginning of each year, and they are consistent with the company's objectives.

Sales Analysis

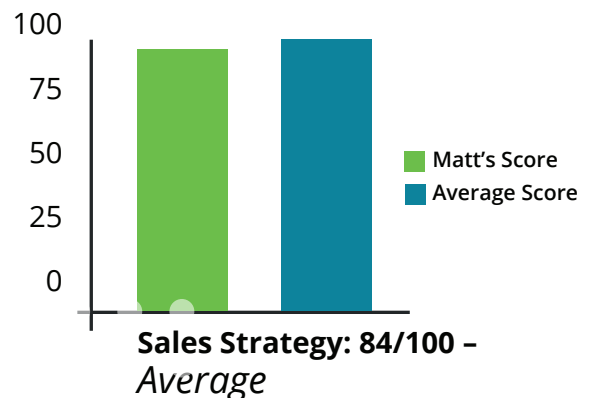
Matt's Sales Analysis score elevated from poor (20 out of 130 points) to average (102 out of 130). Matt and Elizabeth defined annual sales goals in writing but have not yet broken them down by product, industry, and account. They implemented a CRM to track sales activity and now use dashboards to watch key success criteria. All personnel have real-time insight into current sales performance and understand what the results mean. They are updating their compensation plans at the beginning of each year, and they are consistent with the company's objectives. They've made a lot of progress in this area but understand there is still work to be done.

Matt's initial scores are shown below:



Sales Organization

With Elizabeth's help, Matt's team started to conduct in-house training, providing job descriptions during and after the hiring process. This helped the employees to have a better understanding of their role and expectations in the company and how to utilize the resources available. Expectations are now clear, and consequences are consistently enforced. They also solidified a hiring plan to allow for company growth and new team members. While their scores showed an improvement in this area (32 out of 100 points initially, or a poor score, to 84 out of 100 points post engagement for an average score) there is room for growth, so Matt will continue to ask his team for feedback.





Conclusion

Matt's preassessment scores were revealing. With an initial score of 115 out of 400 points, **Matt's company was underperforming**, with all or most of the sales infrastructure components missing and sales generation severely impacted. It was clear his company was struggling and had opportunity for improvement.

Elizabeth crafted a sales plan unique to Matt's company's needs. **She was able to identify key pain points and make recommendations to improve sales performance.** Then, she stepped in as his Fractional VP of Sales, implementing the plan with her knowledge and expertise and holding his team accountable. She worked alongside Matt and the team until the company achieved new levels of success.

Matt's post-assessment score rose to 348 points out of 400, an average score that showed **his company had many sales infrastructure components in place, with some additional components needed.** He and his team were thrilled with the results and feel they have more clarity and organization in their efforts. While they have issues to work on, most of their sales foundation is intact and ready to be built upon.

Thanks to Elizabeth's approach and Sales Xceleration's infrastructure, his company is positioned to achieve historical sales results—with sales systems that can grow with them.





About Sales Xceleration

Sales Xceleration has helped over 3,000 companies build a solid sales foundation and achieve record-breaking sales. Using our proven tools and resources, most companies increase their sales revenue by an average of 32% in the first year.

Matt's company is one of thousands of examples of how our sales advisors use Sales Xceleration's tools and methodology to identify problems and solve them with a different approach. Here's how we do it:

- **We consult AND build.** Our sales advisors not only identify what sales support you need, we make a plan, execute that plan, and provide sales support for as long as you need it. Our advisors act as your Fractional VP of Sales and even help hire your full-time employee when you are ready.
- **We are experienced experts.** Our sales advisors are the brightest and the best. With an average of 20 years of sales experience, they have access to the tools, processes, content, and other professionals to bring the right sales support to your business.
- **We customize a plan unique to you.** Every business is different, so your sales approach should be, too. We take the time to understand your business, learn your challenges and create a plan that gives you the results you want.

Interested in learning more about Sales Xceleration?
Schedule your free consultation today.



Email Us for More Information
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