

2021 ICSC Sales Management Case Study

Final Round Case Update

TOM'S MEETING WITH BILL:

After listening to his team and to your first presentation, Tom finally got time with Bill to update him on some of the initial findings. Tom started the meeting by saying, "Thanks for the time Bill. I think we have some pretty good plans around the technology in the sales organization here at DLL."

"Great, give me the highlights," Bill responded.

Tom started running through the list of ideas, "Well, I think we have a good plan for handling internal software usage and helping our sellers be more efficient in terms of customer onboarding and customer service issues."

Tom then started going through some of the highlights of how DLL was going to launch a series of training sessions to get the sellers more comfortable with the internal technology tools. "We are also going to institute a reverse-mentor program where we have some of our younger more tech savvy sales and CX team members work with more experienced sellers on using salesforce.com. We believe this is a good plan because the street knowledge and sales skills that our veteran sellers have will spill over to the younger sellers. So, should be a win-win. We are also pushing the sales managers to use more data out of salesforce.com to have coaching conversations with the sellers as a way of showing the sales teams that we are serious about data being updated in salesforce.com. And finally...".

Bill chimed in abruptly, "Tom, the internal technology improvements are well and good but honestly what I really want to hear are the plans for getting our sellers to embrace technology as a part of our value propositions to customers. I'm sure you heard Tom, but we lost some pretty significant business at Kone Cranes to a finance company I've barely even heard of. But the Kone team said that they were a little concerned that we just didn't have some of the same technology capabilities as our competitors. They went on to say that they are comfortable using us for bigger more complex deals

but the smaller, more transactional business is going to the more “tech-oriented” competitor. This portion of the business sounds “small” but it represents about \$2,000,000/year at Kone. It’s disappointing because I looked at the competitor’s website and marketing materials and I really believe that our tools are just as good. Yet somehow, this customer came away thinking we weren’t as up to par on technology. Do you have any good insight on this issue Tom?”

Tom shared a few vague ideas when Bill cut him off again, “Tom, it sounds like we have a long way to go here. So, let me just say what I think we need. We need a detailed breakdown of the Knowledge, Skills and Attitudes that the “ideal” tech seller has regardless of industry. Then I want to know how you are going to assess how close our sellers are to this “ideal”? I also want to know if you think we need to hire these “Ideal Tech” sellers off the street or if the KSA’s can be trained into our existing salesforce? I’m fine either way but I want the details of what we are going to do baked into our 2022 strategic plan. Do we need to get creative in how we incentivize people to sell technology? What role does Marketing play as well as how can we leverage our sales managers? Sales leaders are part of the problem if they are not holding their people accountable or trying to fix the situation on the frontlines. I also expect to see a timeline and budget. Finally, I want to know how we are going to measure our progress including some leading and lagging indicators of success. We have to get serious about this Tom. I am retiring next year and I want this to be one of the last, major improvements we make in the company before I ride off into the sunset. And I certainly don’t want to keep losing to companies that don’t have near the experience and value that we can offer customers. Am I clear on this?”

Tom left the meeting with mixed feelings. Clearly the internal technology adoption issues were well on their way to being solved but this tech selling issue is now front and center and a much bigger deal. “One thing is for sure, I’m gonna need a lot of help from my consulting friends...”

TOM’S ASK

Tom called you and filled you in on the details of his meeting and basically handed the project over to you. “The task is pretty clear...get me a detailed plan on the tech selling issue ASAP.”