



NATIONAL SALES TEAM REVAMPS TO ACHIEVE GREATER CONSISTENCY AND PERFORMANCE



A national health plan sought to improve the consistency and performance of its distributed sales and account management teams, located across multiple states. The company engaged Freed Associates (Freed) to help develop a vision, roadmap, and first-year plan for driving significant, sustainable improvements in sales effectiveness across multiple sales offices.

Problem to Solve

Whether you are selling products or services, consistency is vital toward achieving a smooth and predictable sales cycle. Sales team inconsistency impairs measurement and accountability, and can detract from an organization's relevance and reputation.

A national health plan sought to improve the consistency and performance of its distributed sales and account management teams, located across multiple states. The company's sales support functions, such as analytics/reporting, technology and human resources, had led independent initiatives for these teams (e.g., account dashboards; negotiation skill training) to improve their sales effectiveness. While this training helped some teams improve, overall results varied. The company's national leadership had become frustrated with the pace and inconsistency of sales development.

The company engaged Freed Associates (Freed) to help develop a vision, roadmap, and first-year plan for driving significant, sustainable improvements in sales effectiveness across multiple sales offices. Freed's expertise in health care business development and third-party objectivity, as well as its ability to learn and work with the client's culture and environment, were key drivers in being



selected for this engagement.

Strategy & Goals

Up-front, the client informed Freed of the need to complete this work within three months in order to mesh with the client's budget cycle and sufficiently engage the leaders of four key sales support functions. In collaboration with the client, the following goals were identified:

1. Review and assess prior sales efforts to identify key success factors and stubborn challenges by:

- Reviewing previous project documentation
- Interviewing national office and regional sales leaders and staff
- Documenting findings in an executive-ready format

2. Develop a multi-year vision and roadmap for a systematic, integrated and consistent approach for improving sales effectiveness by:

- Drafting a sales office maturity model by location
- Partnering with the client sponsor on frameworks and positioning
- Facilitating a one-day, cross-functional workshop with multiple sales support leaders to test and finalize the multi-year vision and roadmap

3. Identify the necessary leaders and staff members to perform the proposed work by:

- Drafting a new national sales effectiveness charter based on organizational structure and roles
- Creating charters for new cross-functional teams focused on integrated planning, sales, and account management

Results

Freed's interviews with more than a dozen of the client's regional sales leaders revealed widespread agreement that national sales leadership was effective in providing its regional offices with the right set of foundational tools and capabilities. However, the regional leaders expressed frustration with getting team members to embrace and integrate these tools and capabilities into their work. These leaders also reported resource constraints related to office staffing and national sales support.

Insights like these, while conflict-rich, critically helped the client honestly assess and address its needs. Based on this information, Freed developed an initial sales effectiveness plan for the client, which included staffing and resource recommendations, then tested and refined this plan based on



input from the client's national and regional leaders.

Due to their high engagement with this initiative, the client's senior executives helped drive team-wide development, completion and adoption of the new sales effectiveness plan. These executives favorably responded to Freed's review and analysis of past sales improvement initiatives, as well as recommendations for a new sales effectiveness vision and roadmap.

Conclusion

With the company now equipped with a well-vetted and widely accepted sales effectiveness plan, its leadership has a much higher degree of confidence in its sales force's ability to achieve consistent results. Team members in the client's individual sales offices report a higher degree of satisfaction with the support and direction of their organization.