



# Case Study

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## Identify New Revenue Streams

### Company Profile

A global high tech manufacturer with \$14B in annual revenues

### Challenge

The company had multiple approaches to business planning in the field. As a result, there was little consistency and lack of a common process. Many of the methods in use incorporated in-depth historical information and little forward-looking plans. As the sales professionals moved into different roles, they had to use different templates. Support staff had to learn multiple planning approaches to work effectively with the different sales professionals.

### Objective

Design and implement a consistent, worldwide, integrated sales planning and development program. Ensure that the program would identify incremental revenue opportunities.

### Project

- **Analysis**
  - Review of all existing plan approaches and templates
  - Interview field sales personnel to discover best practices
- **Design**
  - New format for business planning with consistent language and methodologies for partner business, major account business and territory business
  - Training program to incorporate the new methodology for planning as well as the analysis tools specific to the audience
  - Automated tools to support the effort, including sample plans and on-line help tools
  - Process for review and approval of plans, as well as management training
- **Implement**
  - Develop communication program including course outlines, presentations, handbook, systems support and multiple communications emails
  - Identify support structure to manage the program on an on-going basis

### Results

Identified \$2B in incremental revenue streams over a twelve-month period.

### Client Comments

- “Provided a logical, realistic process to evaluate customer needs and assist the team in building a plan that can increase revenue.”
- “Excellent facilitation, tools and applicability.”
- “Real life exercises that benefit us immediately.”



We measure our success by your results

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