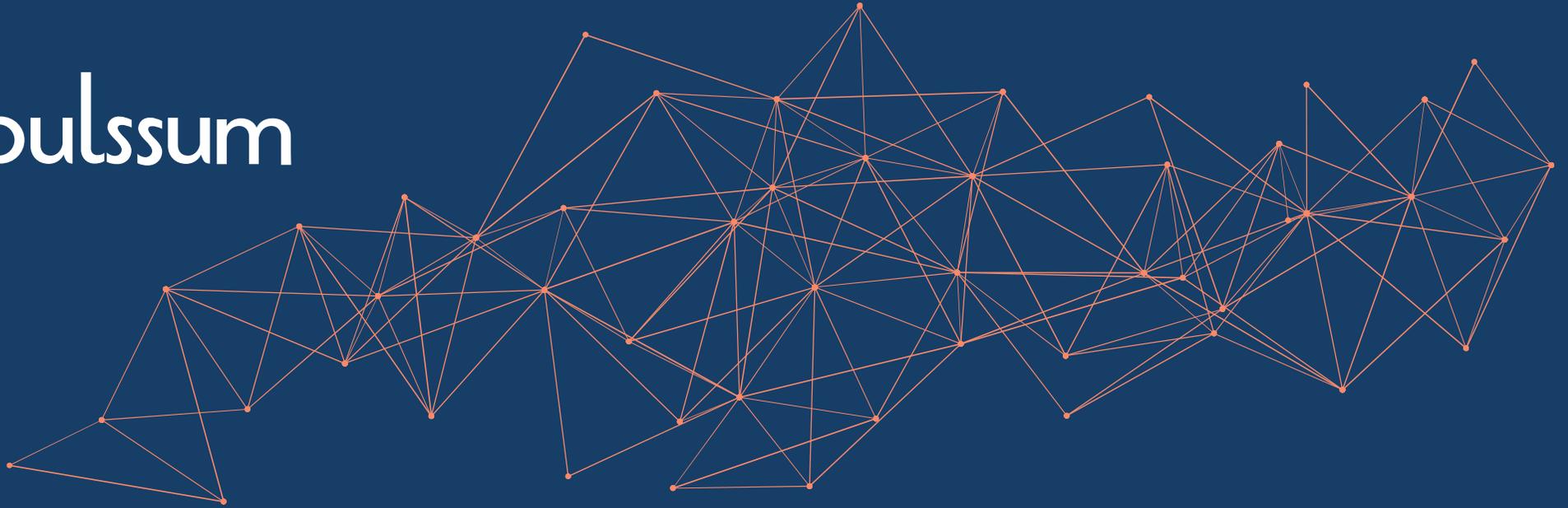# impulssum

Account Mgmt. Transformation: Customer example

Case example: Implementing a full sales transformation for a Managed IT Service Provider

What they wanted

Our customer is a Managed IT service provider and one-stop-shop for all IT needs of SME companies. The company grew over a buy & build strategy. Increasing revenue from existing accounts is the biggest revenue driver in the investment case. The sales & account mgmt. function works very informal, meaning that processes and tools are not used to their full potential. We have been asked to upgrade it to a state-of-the-art department.

What we did

We analysed the current situation and identified pain points and gaps to be closed. We then started and implemented a transformation program with a wide range of activities (CRM upgrade, Monitoring dashboard, Training document/ Blueprint, Battlecards, Quotation centralization, Off-loading operational tasks, NPS introduction) and included the wider sales & account mgmt. organization with us on that journey to create needed buy-in.

What we achieved

The sales & account mgmt. organization has embraced the new way of working. The Monitoring dashboard helped to reduce workload (e.g. offload operations tasks) and prioritize actions (e.g. which opportunities to invest time). The Head of the department can steer better on data insights and ensure the new way of working is sustainably embedded. As a main result, the size of the pipeline and consequently revenue increased.

We performed a full analysis of the end-2-end process to identify all gaps
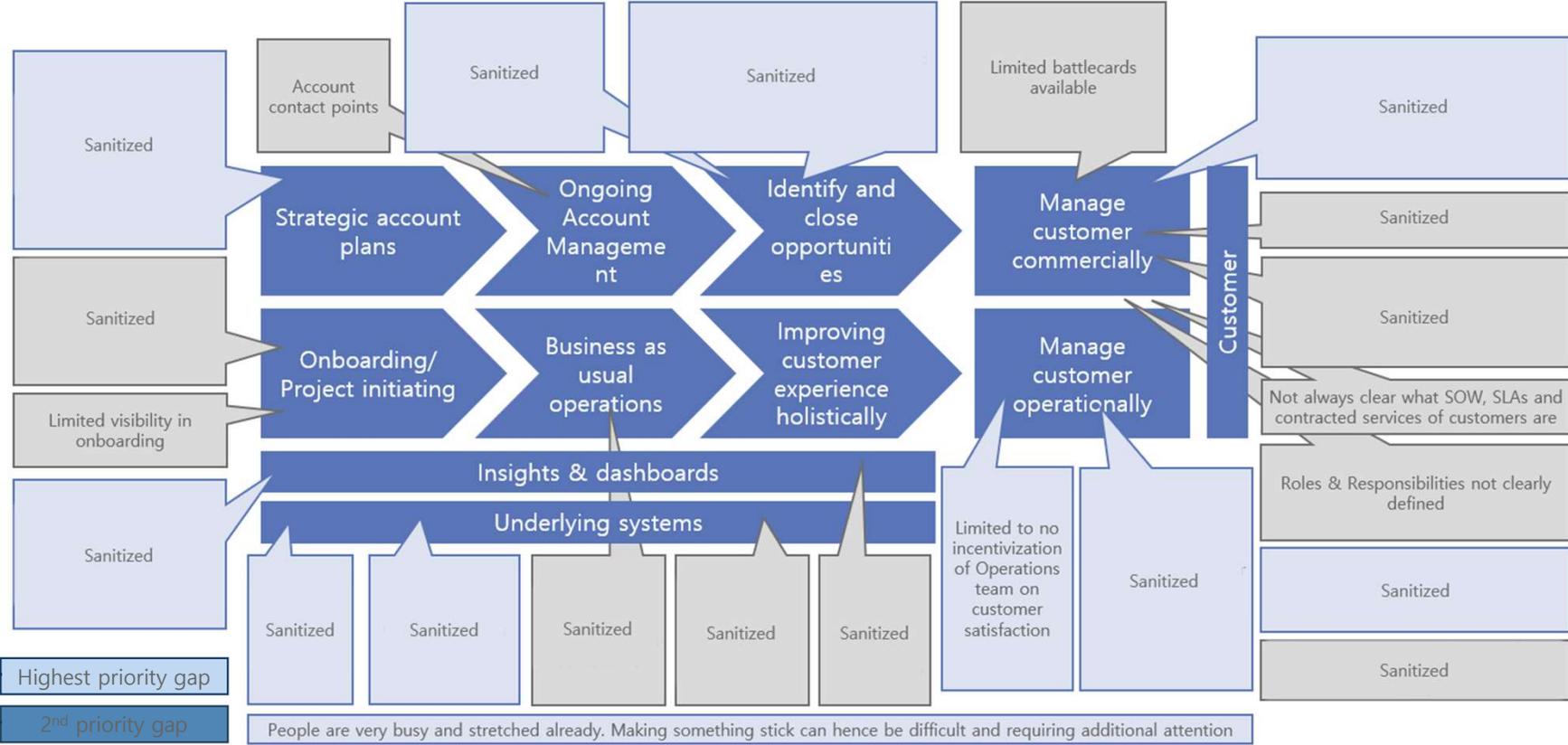
In order to transform the account mgmt. activities, we needed to change processes, upgrade tools & monitoring and change people's behavior

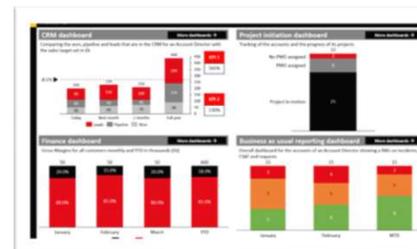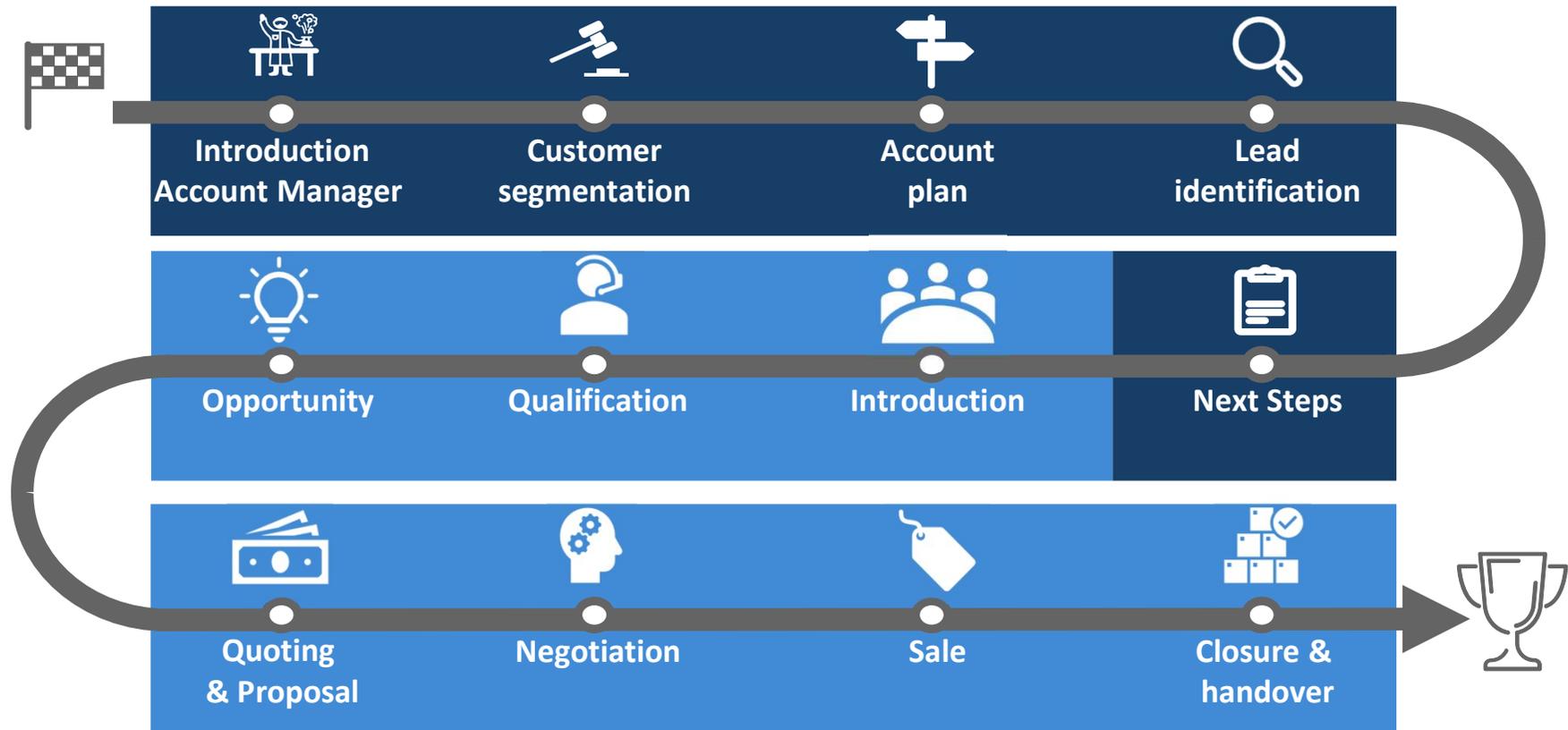| **Improve Processes**	**Improve Tooling**	**Improve data insights**	**Change People's behavior**
• Creation of a full blueprint document explaining the way of working incl. tooling & insights • Allowing new account mgrs. (hired or acquired) to start working in best practice way as well	• Identify needed tooling that requires improving (e.g. CRM, digital marketing, etc.) • Create business requirements • Manage technical implementation to ensure correct implementation	• Create meaningful and actionable data insights that enable a more efficient & effective working • Include commercial activities, but also operational insights • Ensure Head of Account Mgmt. has the insights to steer effectively	• Include people from day 1 in the project • Include several people in sub-workstreams • Train everyone & document trainings • Maintain on board in first 3 months after go-live for coaching and ensuring process compliance

Our Blueprint covers all parts of the Sales & Account Management process

Introduction Account Manager

Customer segmentation

Account plan

Lead identification

Opportunity

Qualification

Introduction

Next Steps

Quoting & Proposal

Negotiation

Sale

Closure & handover

In the first phase we defined the sales process in detail, to identify detailed process and tooling improvements

A transformation plan was created to achieve the Blueprint way of working, divided into 4 workstreams with a total of 12 individual initiatives

Workstreams	Deliverables

High Priority ↓ **Low Priority**

1 Set the basics for state-of-the-art Account Management and push democratization of customer information
- Implement end-2-end Account Mgmt. workflow in CRM
- Create dashboard for steering
- Ensure Account Managers enter data into CRM as intended

2 Ensure effective internal processes on interfaces between Account Management and Operations
- Create more visibility in project initiation
- Define clear Roles & Responsibilities
- Incentivize Operations on customer satisfaction
- Introduce NPS on relational and service area level

3 Upgrade Account Management sales capabilities
- Defined account plans as basis for all commercial activities
- Train Account Managers to sell effectively and 100% the offering
- Centralize quotation creation and introduce a discounting governance

4 Upgrade Account Mgmt. effectiveness further
- Automate and synchronize Marketing opportunity creation process
- Create sales incentives to promote cross-functional cooperation

Upgrading tools (e.g. CRM) and using it consistently increases the possibilities to steer based on data in actionable dashboards
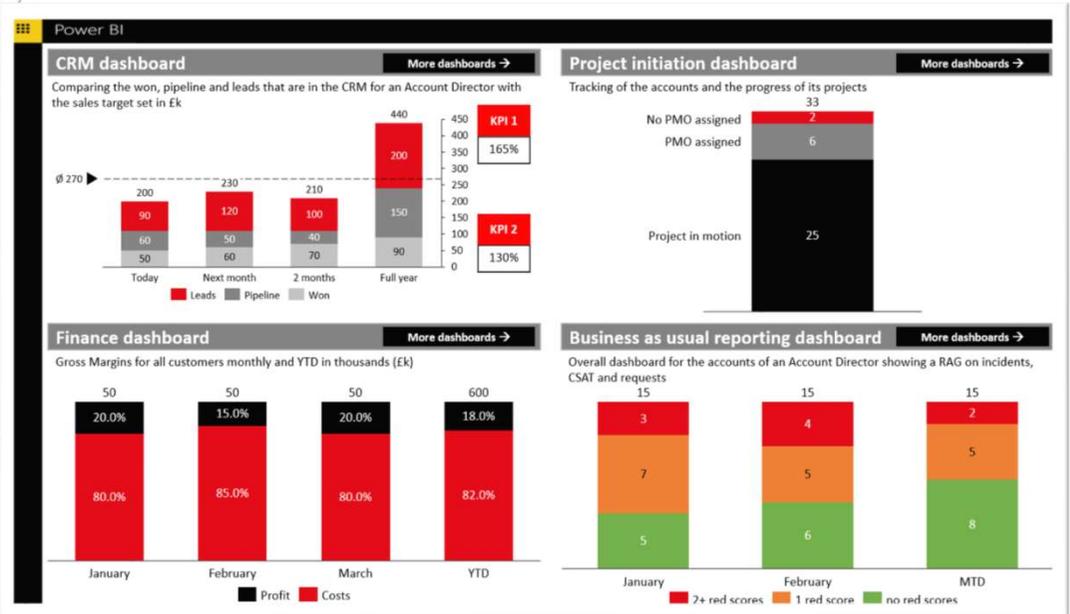
1 **Step for step handbook of how to use CRM included in Blueprint**

2 **Actionable dashboards needed to increase effectiveness & efficiency**

Project increased visibility & activities for share of wallet leads, as view increased from sales cycles of 3 months to 18 month forward looking

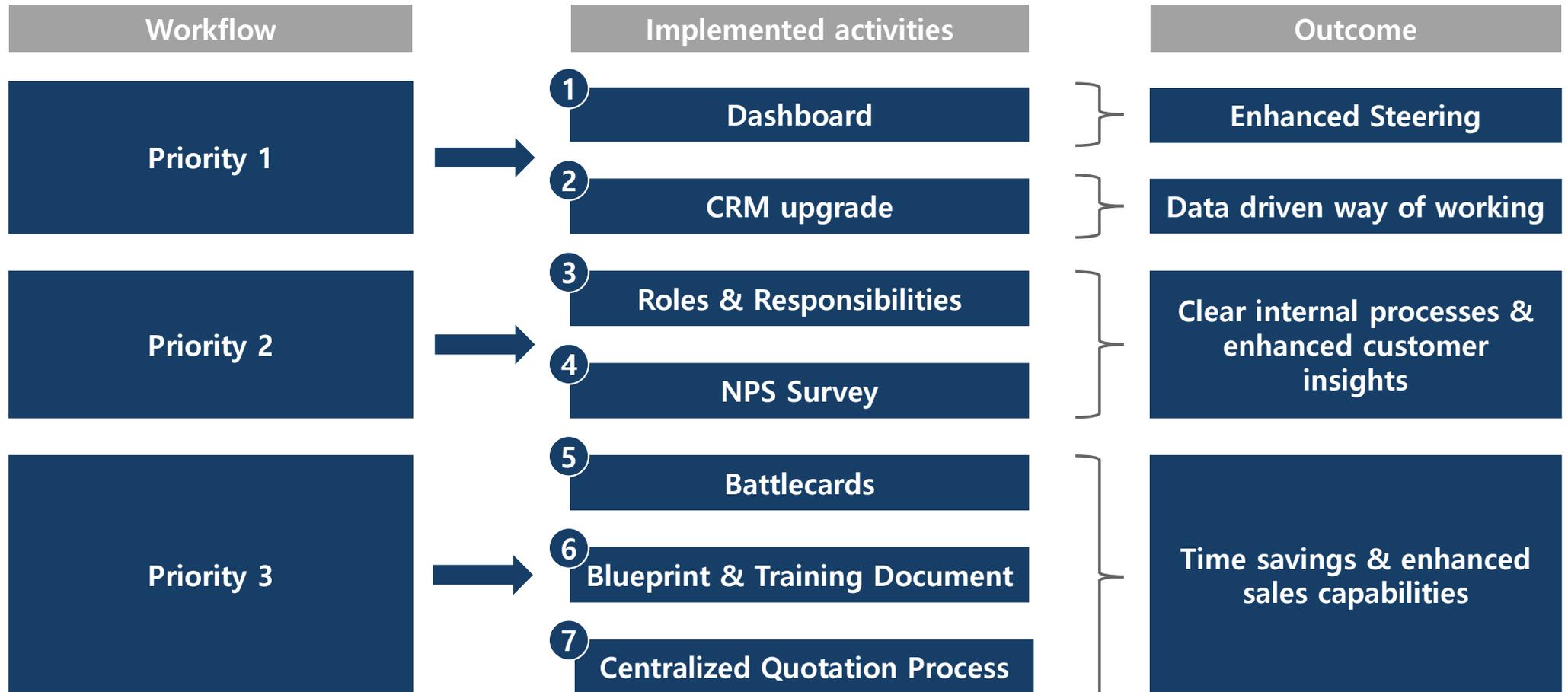GP potential in €m on top of current run-rate for Top 20 accounts (from CRM & Account Plans)

Total potential increase of accounts Gross Profit in case all share of wallet leads & opportunities would be won

+59%

| | Total Revenue | One-off | MCP |
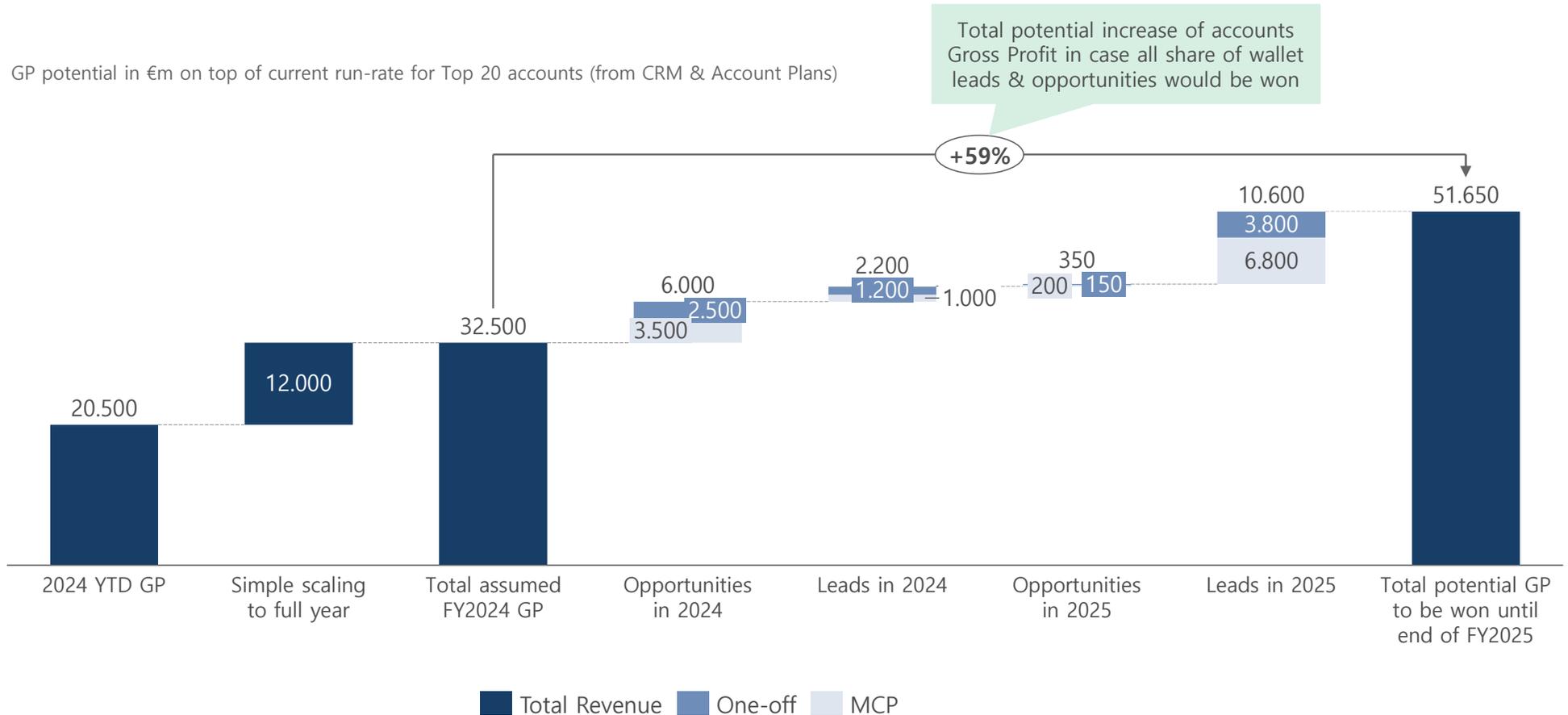
Risks for a timely implementation were identified and mitigations set in motion

Risk	Description	Impact if materializing	Mitigation
Project capacities	People are stretched and have limited time to spend on working out the details of the project	Later implementation, potentially not all scope implemented	• Identify the right people to deliver project (do we have them in the business?) • Free resources if possible • Plan realistic timelines • impulssum to take the heavy lifting
Capacities to change	People are stretched. They may want to change, but the moment something urgent jumps in, they may jump back to old behaviors	Intended change will not happen, no improvement in effectiveness of Account Managers	• Monitoring needs to be set up to identify who is not following new process • Furthermore, right senior management attention (e.g. CRM dashboard in monthly board meeting appendix)
Cultural change	People are used to be working in a certain way, especially more senior members who meet their numbers	Intended change will not happen	
CRM data entry	Entering the data into the CRM could be seen as an extra burden that doesn't add immediate value	Limited effect of activities as CRM is backbone for data driven planning and dashboards to manage performance	• Steps above (Monitoring and Sr. Mgmt. attention) • Additional resources made available to include initial information into CRM • CRM entry needs to be simple and system needs to add value to Sales/ Account Mgmt.

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We set up the internal team to support in the implementation, ensuring the account management team is involved and buys into all of these topics

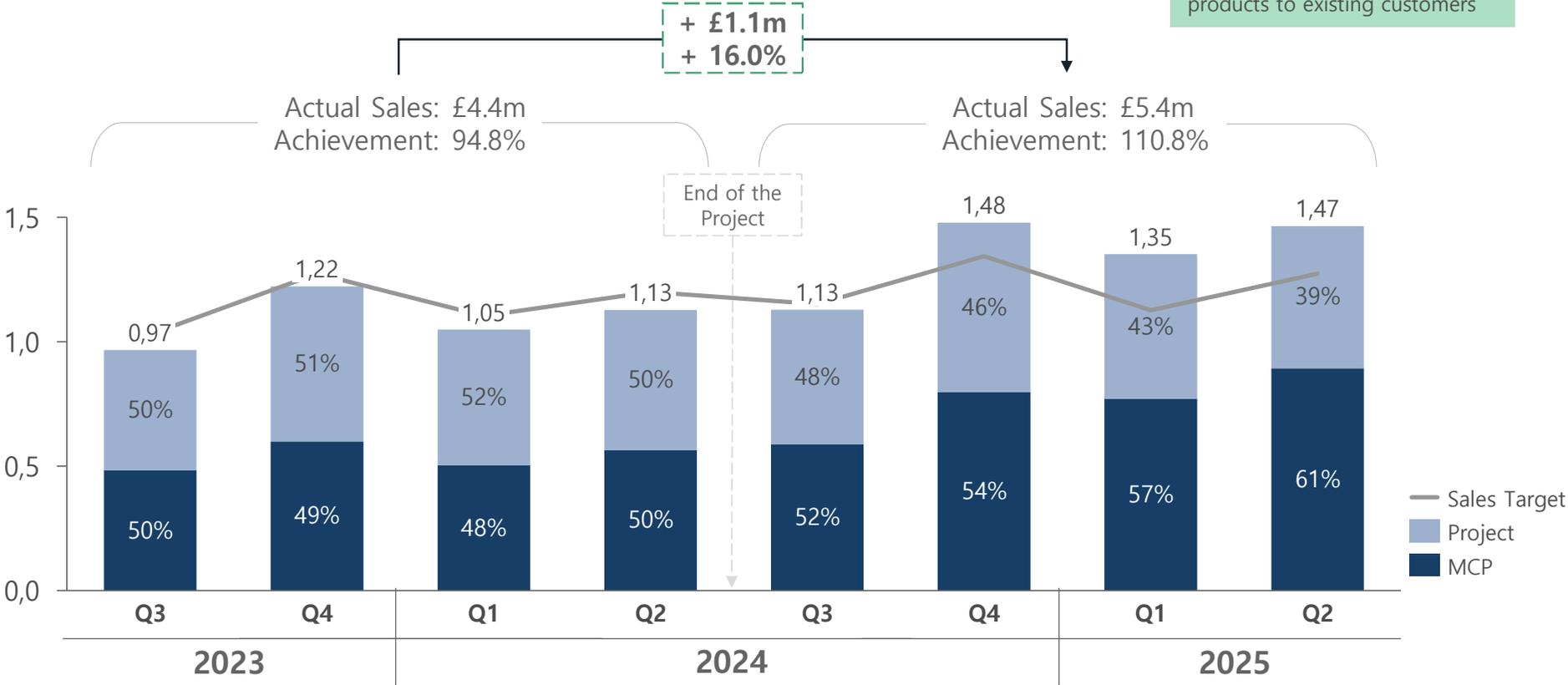|	**Project team**	**Topic specialists consulted**
Priority 1 Workstream	• Marketing employee • Account Manager 1 • Head of quotations • External party	• Head of Account Management • IT specialist • PowerBI resource • Rest of Account Mgmt. team
Priority 2 Workstream	• Head of Operations • Head of Controlling • Person responsible for NPS set-up • Account Manager 2	• COO • IT specialist • Operations managers • Head of Account Management
Priority 3 Workstream	• Head of Quotations • Quotation specialist • Account Manager 3	• Head of Account Management • Pre-sales team • Sales team

The different implemented activities created an increased performance, however biggest impact was an increased pipeline performance

Workflow	Implemented activities	Outcome

Priority 1

1 Dashboard → Enhanced Steering

2 CRM upgrade → Data driven way of working

Priority 2

3 Roles & Responsibilities

4 NPS Survey

→ Clear internal processes & enhanced customer insights

Priority 3

5 Battlecards

6 Blueprint & Training Document

7 Centralized Quotation Process

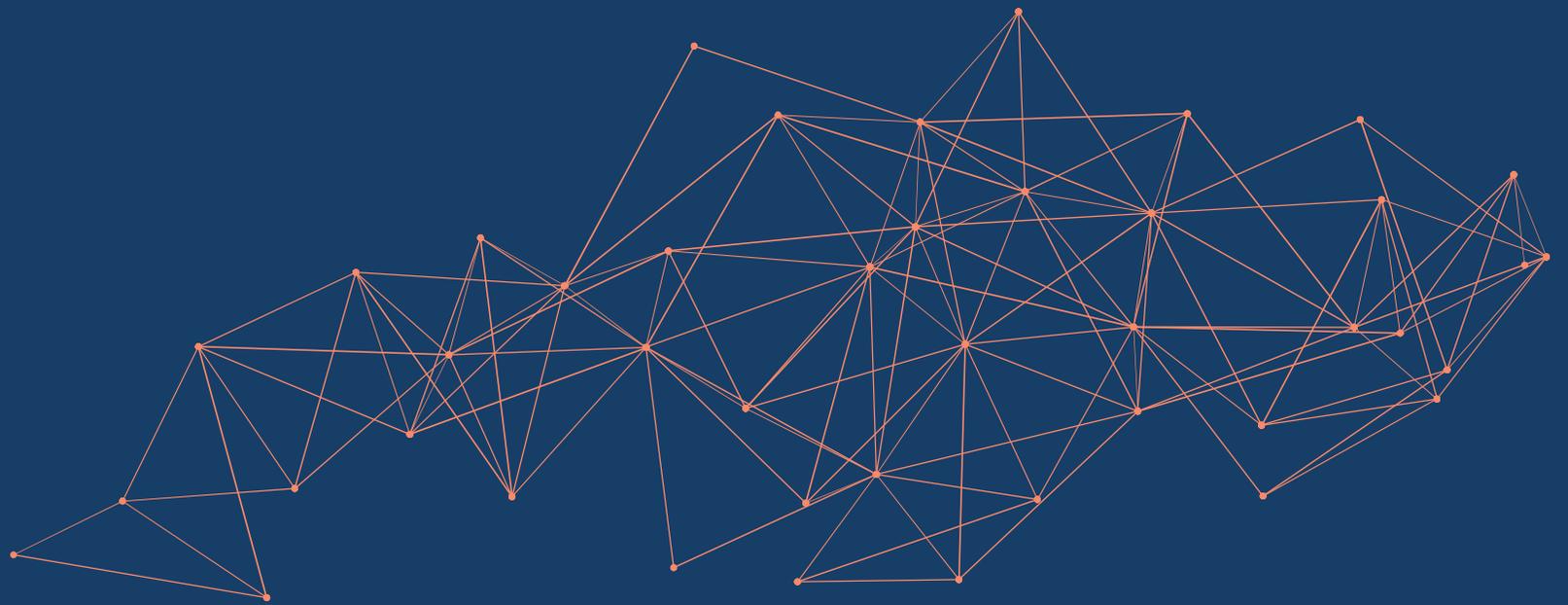→ Time savings & enhanced sales capabilities

The transformation led to an increase in MCP/ ARR opportunities that were mainly driven by an increase in cross-selling of other products

Gross profit sales performance per quarter for past 2 years

In Gross Profit in Mln £

Majority of MCP addition comes from cross-selling of new products to existing customers

+ £1.1m
+ 16.0%

Actual Sales: £4.4m
Achievement: 94.8%

Actual Sales: £5.4m
Achievement: 110.8%

End of the Project

	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
	2023		2024				2025	

Sales Target
Project
MCP

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