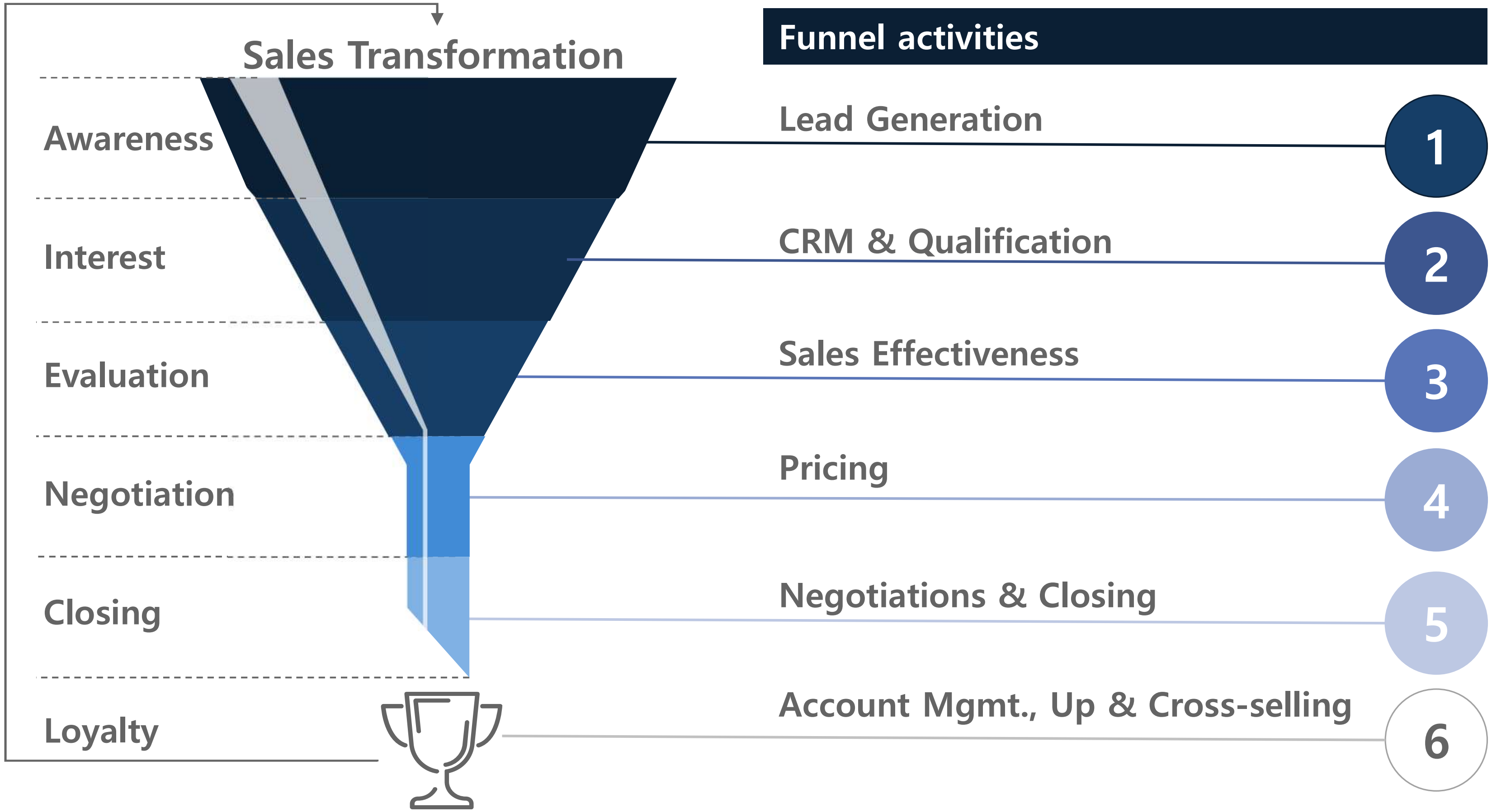
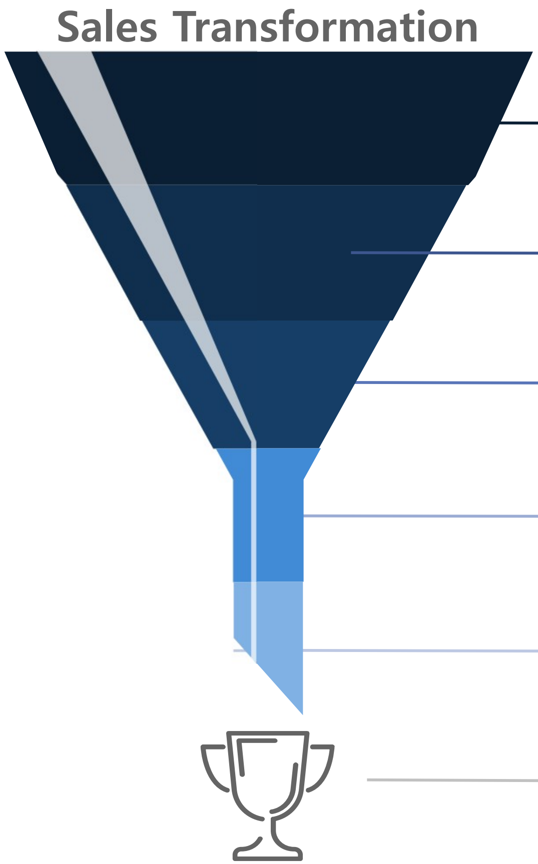
impulssum

Sales Transformation: Customer example

This deck focuses on the optimization of each part of the Sales Funnel



Each funnel activity drives specific sales impact



	Funnel activities	Sales impact
1	Lead Generation	Bigger Pipeline
2	CRM & Qualification	Higher impact salespeople
3	Sales Effectiveness	Data driven steering
4	Pricing	Increased margins
5	Negotiations & Closing	Higher conversion rates
6	Account Mgmt., Up & Cross-selling	Higher share of wallet

In each step of the sales process, certain activities need to be performed

Sales funnel dependent activities

1 Market Insights
- Size and market share of the market
- Competitor Insights
- Customer insights (e.g., segmentation, NPS)

1 Ideal customer profile
- Identify the ideal customer profile (ICP)
- Creating a target list

1 Marketing alignment
- Brand and value proposition
- Alignment between sales strategy and marketing campaigns
- Battlecards

2 Lead generation
- Push (e.g. cold calling) & Pull (e.g. digital marketing, events) lead generation
- Lead scores

2 Qualification
- Qualification process
- Identifying willingness to buy (WTB) & to pay (WTP)
- Efficient use of time per opportunity

3 Sales Proces
- Sales & GTM strategy
- Sales Process Blueprint
- Effective sales pipeline management
- Use of tools by humans

4 Pricing
- Method of pricing (e.g. cost+ or value-based)
- Regular price adjustments
- Quotation process
- Discount management

5 Negotiation & Conclusion
- Value-driven negotiations
- Handling of objections
- Transfer to operations

6 Account Mgmt.
- Share of Wallet analysis
- Account plans
- Cross-/ Up-selling
- Churn management

Independent activities

Performance Mgmt.
- Availability of data insights
- Sales and Marketing ROI
- Margin realisation per customer
- People's performance
- Benchmark

Organization & Training
- Effective organization (aligned with markets, roles, and responsibilities)
- Training Programs
- Bonus incentive

Tooling & Data insights
- Efficient Tooling tech stack
- Data quality and depth
- Relevant customer insights
- Data-driven management
- Forecast and KPIs

Improvements require in our experience adjustments to Processes, Tools, Data Insights and People’s Behavior

Improve Processes

- **Workflow Analysis:** Identifying inefficiencies in processes
- **Expert knowledge:** Get in expert knowledge on specific topics (e.g. pricing or SEO/ SEA)
- **Design:** Finding standardisation potential and develop new processes
- **Implementation:** Ensuring system connectivity and automation
- **Post-Implementation:** Ensuring training and adjusted decision making using new processes

Improve tooling

- **Expertise:** Scanning of the tool landscape
- **Research:** Finding the right tool for the clients’ purposes
- **Implementation:** Enhancing process efficiency through automation
- **Learning:** Ensuring documentation and training of stakeholders
- **Monitoring & Control:** Implementing proper monitoring

Improve Data Insights

- **Analysis:** Analysing existing data structures & connectivity
- **Business Requirements:** Identifying business requirements for insights & monitoring
- **Formatting:** Visualising the necessary monitoring requirements
- **Enhance:** Improving data connectivity and creating new data collection workflows
- **Building & Implementation:** Building the dashboard with the data insights and train employees

Change People’s Behavior

- **Change Management:** Making changes in people’s behavior takes time, the right mindset is key
- **Pragmatic:** Establishing a two-way approach between client and impulssum is of importance from the start
- **Identify Internal Change Leaders:** Ensuring that changes are made is done through leading by example of influential people
- **Personalised Approach:** Tailoring the methods to needs & monitoring progress are part of the process

Setting clear KPIs and monitoring them together with a clear Governance from Management to the Sales & Marketing is needed for success

Overall Revenue development split into running business, renewals, account mgmt. and new logo

1 Market Insights
- NPS score

1 Ideal customer profile
- Size of target list
- Size of existing customer base
- Customer activity score

1 Marketing alignment
- Performance on Marketing activities (reach, opening rates, conversion)
- # of Marketing qualified leads

2 Lead generation
- CRM activity score
  - Target list activity
  - Opportunity activity
  - Account plan activity
- # of new opportunities & leads

2 Qualification
- Time usage efficiency score (conversion rate of personal meetings vs. time spend on calls and mails)
- Pipeline quality score (qualification)

3 Sales Proces
- CRM process adherence score
- Conversion of each stage in sales funnel

4 Pricing
- Time to proposal
- Time of last price adjustments
- Pricing benchmark vs. competition

5 Negotiation & Conclusion
- Conversion rate once we have pitched for business

6 Account Mgmt.
- # of account plan leads
- Renewal rate, churn rate or repeat purchase
- Up- & cross-sell revenue
- Customer CRM activity

Independent activities

Performance Mgmt.
- Data availability score
- Performance vs. targets/ y-o-y
- Sales & Marketing ROI
- Gross & contribution margins

Organization & Training
- Bonus achievement rate
- Training participation rate

Tooling & Data insights
- Sales tools user acceptance score
- Data quality score
- Forecast accuracy score

Identifying the right ICP and the best way to reach them ideally in a multi-channel setting is the basis for successful Lead Generation

Understand the Value Proposition

- List **key offerings** and features
- **Define** your **value proposition**

Execute market research

- Identify **market trends**
- Understand the **competition**
- Utilize different **research methods**
- **Examine** existing **customer base**
- Identify **common characteristics**

Define the Ideal Customer Profile (ICP)

- **Combine** all the **information** to **define** the **Ideal Customer Profile (ICP)**
- Calculate the **Customer Lifetime Value (CLV)** to identify which customer bring the most **long-term value** to your business

Define Lead-gen acitivities

Type of Lead-gen activities, e.g.:

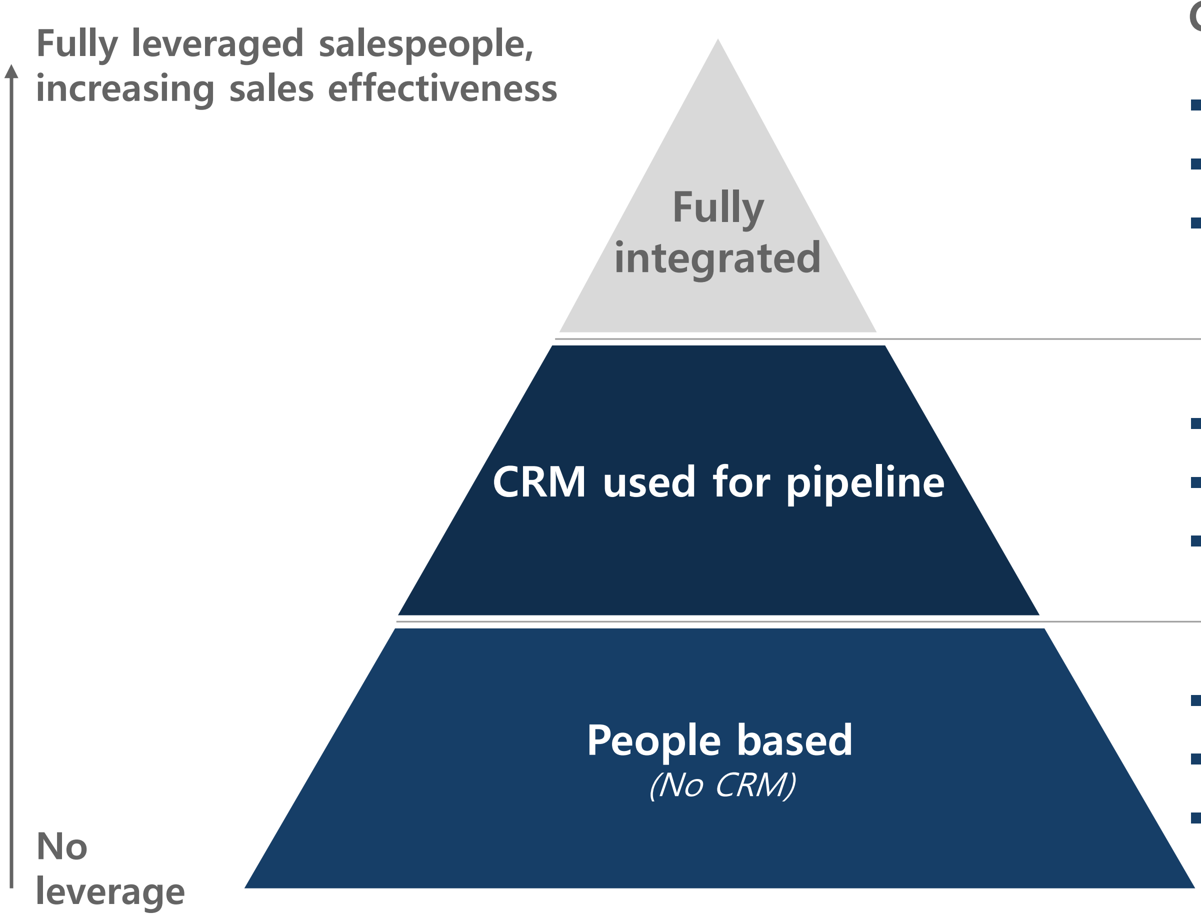
- **Outbound mail, social and call**
- **(Digital) Marketing**
- Conferences
- Affiliate and partner programs
- Outsourced Lead Gen (e.g. Content)

These activities can also be partly be automated (e.g. Sales automation)

Allocate budget and implement

- **Scope** the outreach campaigns in terms of **duration and targets**
- Assess **budget needs** for targets
- **Implement** lead-gen activities

When used fully integrated, a CRM system can help to leverage the effectiveness of your salespeople



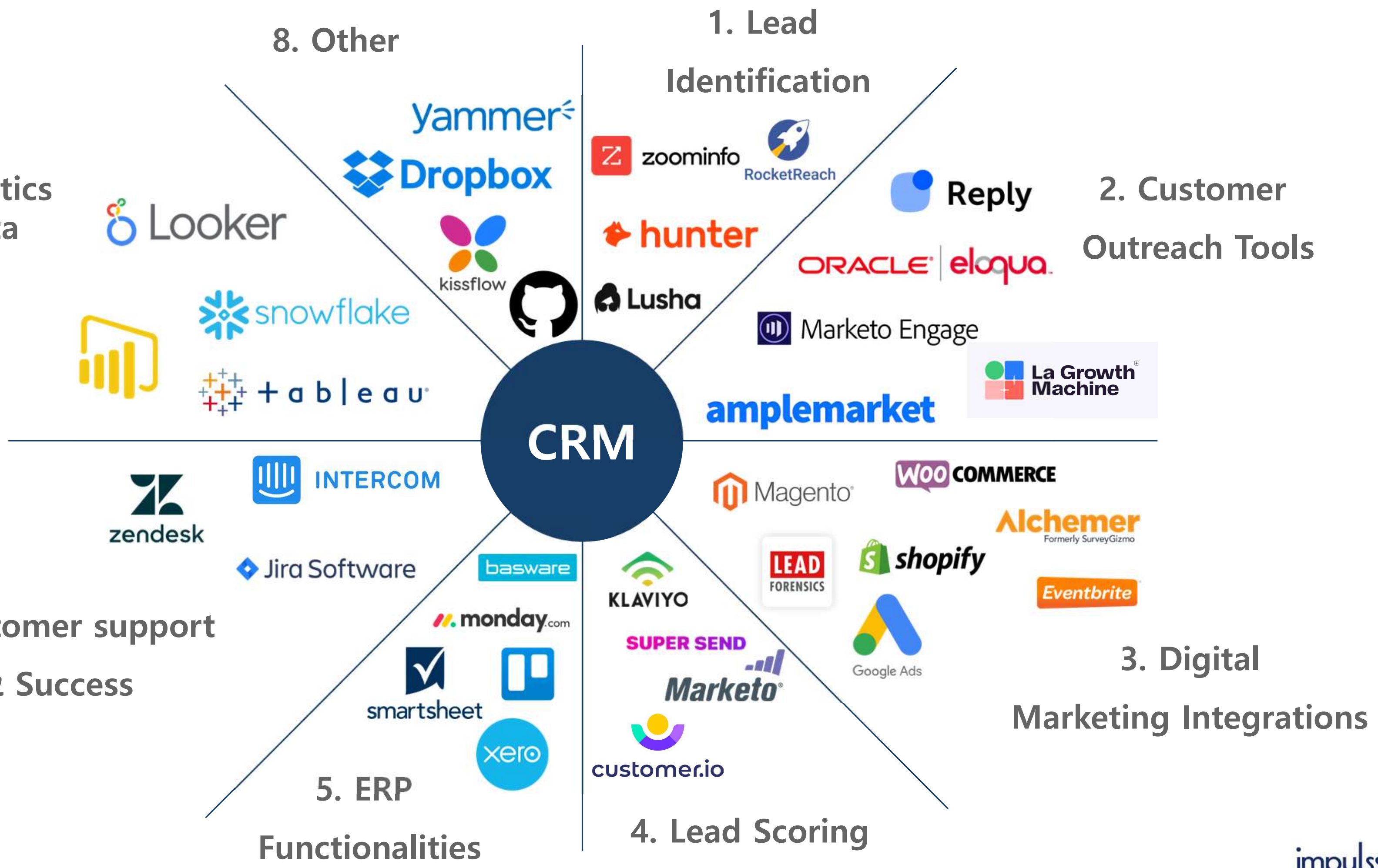
Characteristics

- CRM used as single source of truth
- Integrations with other tools/ software
- Extensive insights and monitoring from the CRM

- Sales uses a CRM, mainly for their pipeline
- No integrations with other software in use
- Some forecasting & monitoring in place

- High dependency on key salespeople
- Highly diversified ways of working
- Low data quality, lots of spreadsheets used

Next to the CRM, the effectiveness and efficiency can be further increased by integrating additional tools into the commercial process



Qualification of leads or opportunities is key to prioritizing customer potential and increase margins and closing rates

Qualification

Qualification (frameworks)

Leads	Opportunities	Sales effectiveness & closing
BANT	**MEDDICC**	**Willingness to purchase/ pay**

BANT

- **Budget:** Is there enough budget to purchase?
- **Authority**: Does the contact have decision power?
- **Need**: Is the contact in a need?
- **Timeline**: When does the contact want to purchase?

MEDDICC

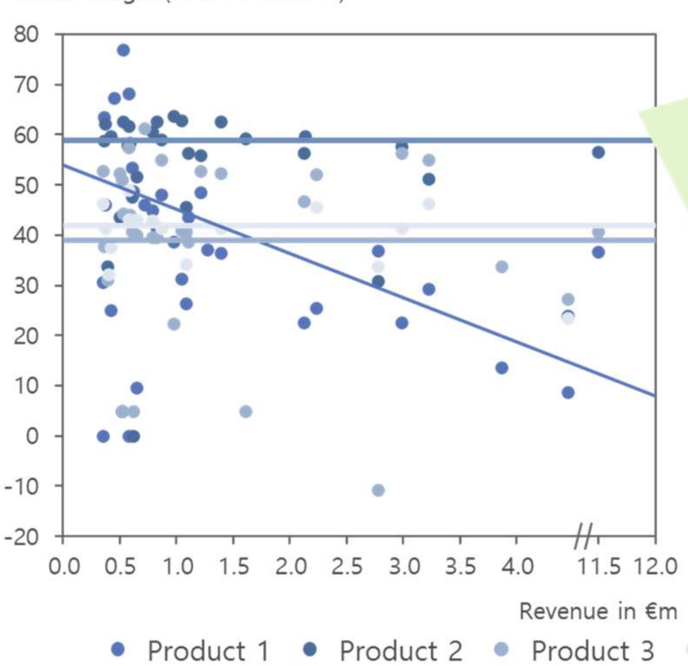
- **Metrics**: What KPIs matter most for the buyer?
- **Economic buyer**: Who's in charge of financial decisions?
- **Decision Criteria**: What requirements does the product/ solution have to have?
- **Decision Process**: What steps are there in the decision process?
- **Identify Pain**: What pain points does your prospect have and how can we help them?
- **Champion**; Who is the internal champion?
- **Competition:** Who else is pitching for this business?

Willingness to purchase/ pay

- Identify the qualification questions to assess the **willingness to purchase and willingness to pay**
- **Willingness information** can be KPIs such as "how much time does my prospect make for conversations"
- **Increase sales effectiveness** by focusing more time on high willingness to purchase prospects
- **Increase prices** for prospects with high willingness to pay
- **Coach the Sales** team **and communicate the value** that customers get in the closing phase, also highlighting the willingness insights

Data insights enable to improve results by identifying customer and process performance opportunities

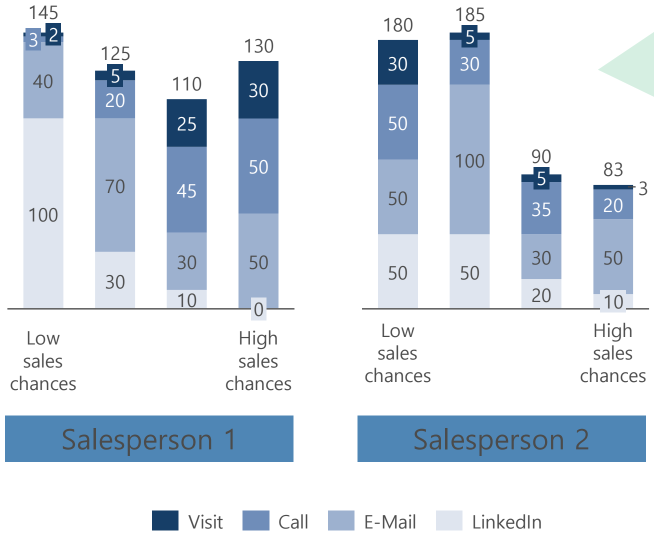
Example: Customer opportunity insights that drive the right activities



Takeaway: Smaller Customers should have higher Gross Margins. Only Product 1 is showing a correlation between size and Gross Margins.

Actions: Increase prices for smaller customers

Example: Process performance opportunities in the form of sales effectiveness



Salesperson 1 has the right activities for the right type of opportunities

Salesperson 2 is working ineffectively by using the wrong activities in the wrong sales cycle phase and by focusing his/her time on the wrong opportunities

Sales people need to spend more time selling, updated processes, ideally with use of AI, increase quality and reduce cost

1. ICP & target list
2. Personalization
3. Outreach automation
4. Sales collateral creation

Sales activities

Sales needs to have more time to have sales conversations

5. Pipeline Mgmt.
6. Forecasting
7. Sales Coaching
8. Performance Mgmt.
9. Contract Mgmt.
10. Handover to Customer Success
11. Post-sales insights

Customer example: ICP & Target list creation that increased the hit-rate of your target list by better targeting and increased personalization at scale

Identify ICP

Select your Ideal Customer Profile (ICP) from LinkedIn.

Set individual filters (demographics and firmographics) to identify potential prospects

Sharpen ICP list

Add additional information to the target list that sharpens your ICP list to the ones that really matter

Example for an MSP: Which antivirus software is used by company?

Add contact info

Add contact information with enrichment tools

Upload to CRM

Upload the target list incl. contact details and first personalization factors (e.g. which antivirus software is used) into the CRM for further activities

Value Based Pricing is a holistic approach aiming at increasing customer centric decision making

Customer

- Identify ways of structurally identifying customer needs, perform first version together and transfer knowledge
- Identify ways of structurally measuring customer satisfaction (e.g. NPS, continuous CRM collection of feedback)
- Link both to strategic agenda, Marketing & Operations planning

Marketing & Sales

- Identify main Hypotheses of what drives customer decision & willingness to pay
- Define Packaging & Pricing in line with customer needs
- Identify Upselling paths and migrations for existing customers
- Define Discounting governance for the sales organization
- Ensure Sales can effectively sell & communicate Value to customer

OPS & CEX

- Identify Operational (OPS) & Customer Experience (CEX) activities needed to deliver the Value that customer are looking for
- Create improvement OPS & CEX implementation plan
- Implement Value Communication in day-to-day operations in most important Customer touchpoints to increase customer perception of the Value delivered

In closing negotiations, the sales team needs to be able to communicate and sell based on the Value a customer gets and match it to their needs

Sell and price based on customer needs and value…

… Enable teams to **understand and communicate the relevant value** to the customer…

…Learn, and improve continuously to **increase closing rates** and **margins**

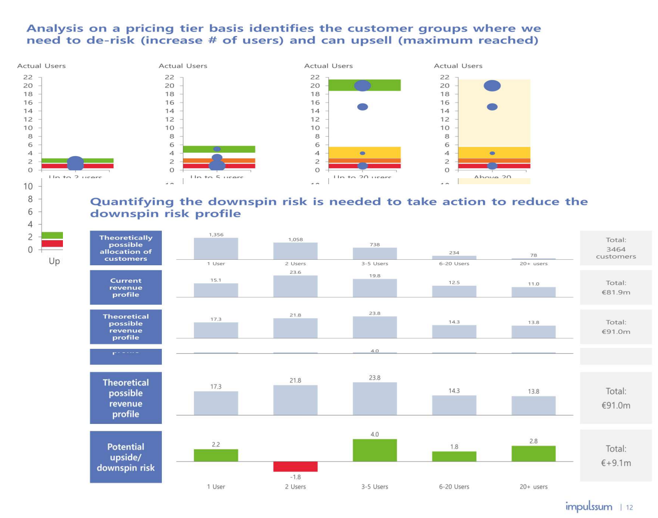
This is ideally supported by a pricing & sales value tool that allows for monitoring of win rates but gives also strategic insights into customer value needs & behavior

6 Up & Cross selling

Identify up & cross sell opportunities based on data analysis and then execute them by enabling account managers to approach them effectively

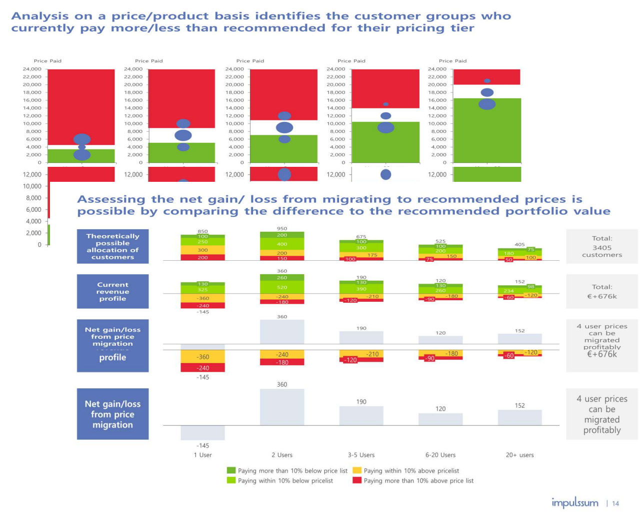
Monitor user utilization in each user-tier for upsell/downspin

Users utilized



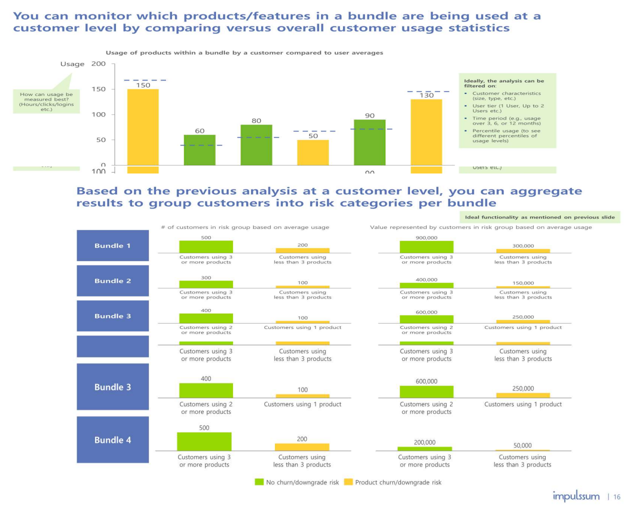
Monitor price levels versus pricelist for churn risk and price increase potential

Price levels



Monitor feature usage in portfolios for downgrade/churn risk

Features used



Customer example #1
Full Sales Transformation

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.

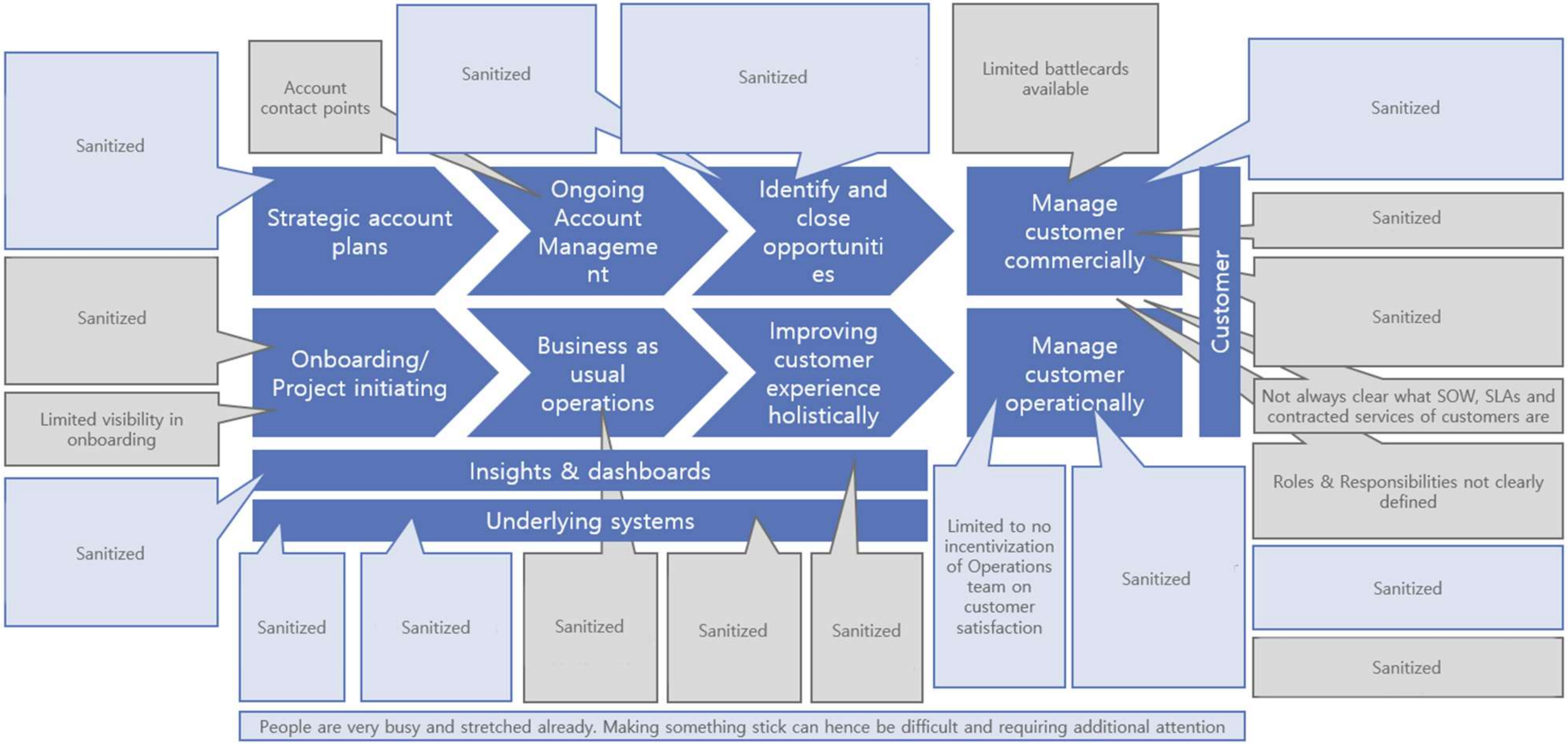
What we achieved

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 by 16%.

We performed a full analysis of the end-2-end process to identify all gaps

Highest priority gap

2nd priority gap



In order to transform the account mgmt. activities, we needed to change processes, upgrade tools & monitoring and change people's behavior

Improve Processes

- 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

Improve Tooling

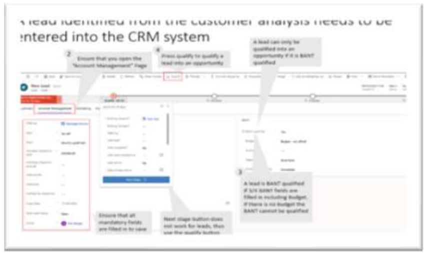
- Identify needed tooling that requires improving (e.g. CRM, digital marketing, etc.)
- Create business requirements
- Manage technical implementation to ensure correct implementation

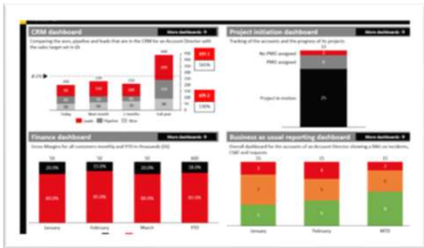
Improve data insights

- 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

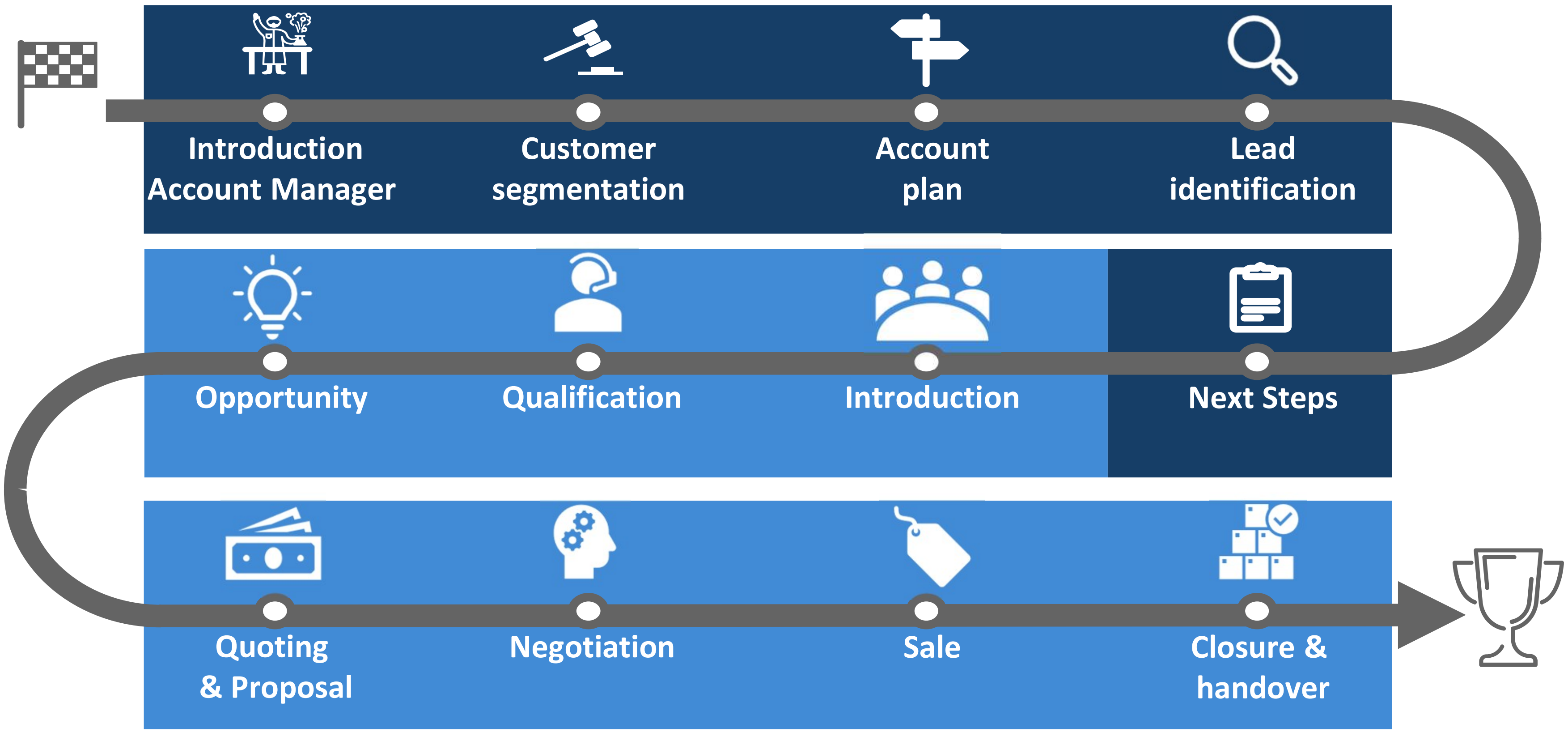
Change People's behavior

- 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

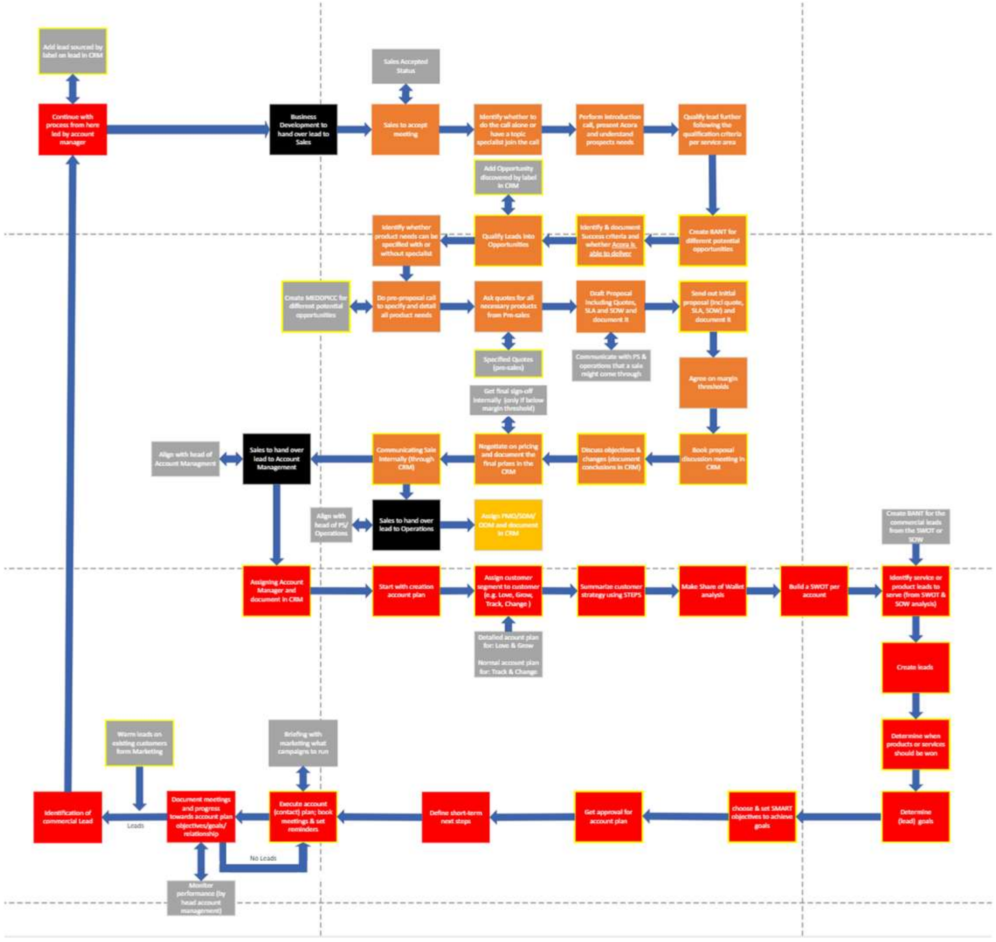




Our Blueprint covers all parts of the Sales & Account Management process



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



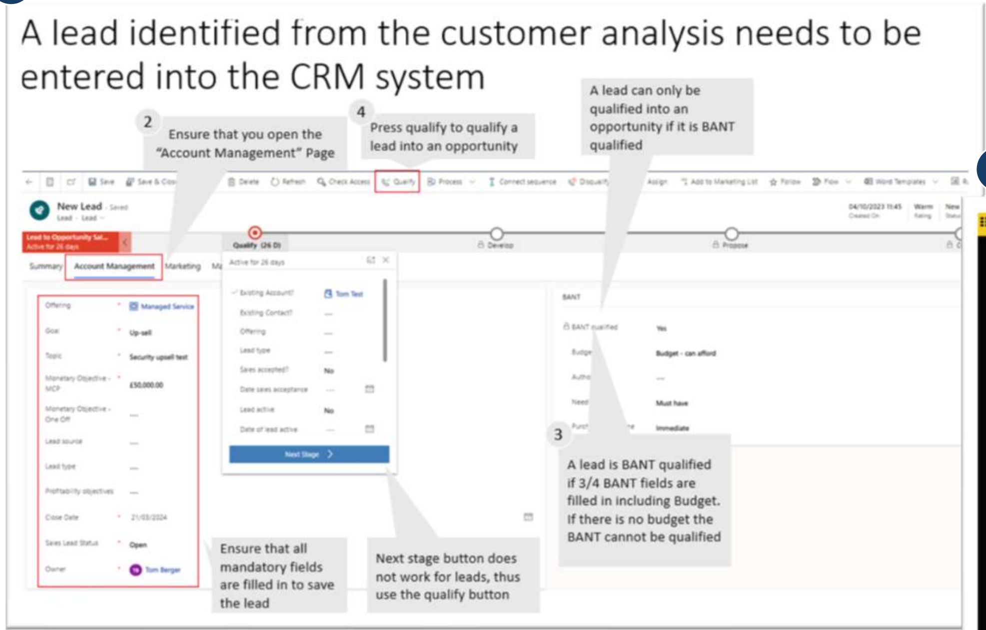
A transformation plan was created to achieve the Blueprint way of working, divided into 4 workstreams with a total of 12 individual initiatives

High Priority → Low Priority

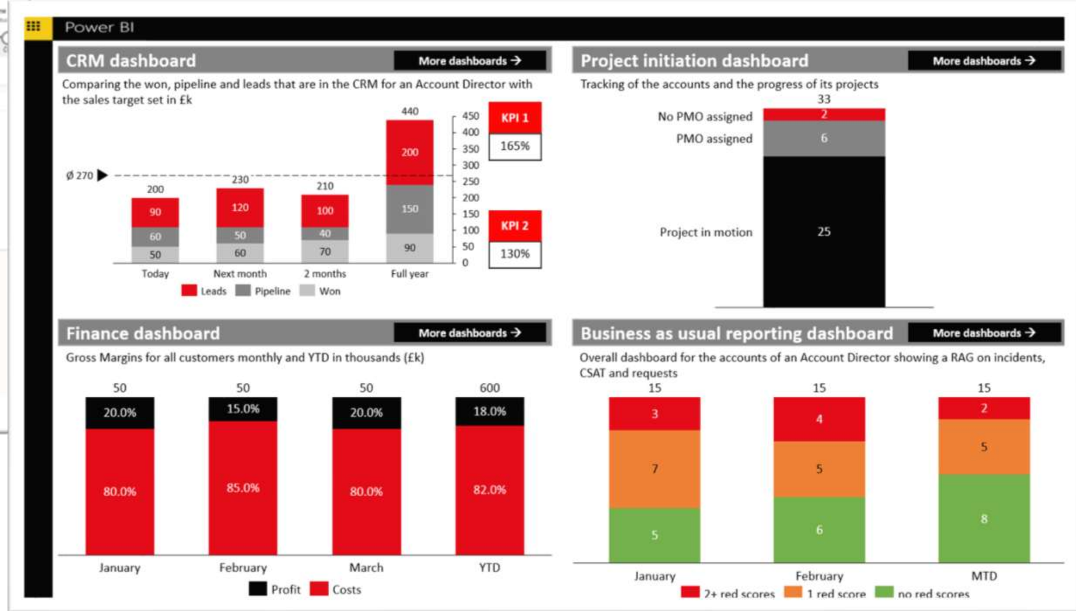
Workstreams	Deliverables
1 Set the basics for state-of-the-art Account Management and push democratization of customer information	Implement end-2-end Account Mgmt. workflow in CRM Create dashboard for steering Ensure Account Managers enter data into CRM as intended
2 Ensure effective internal processes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

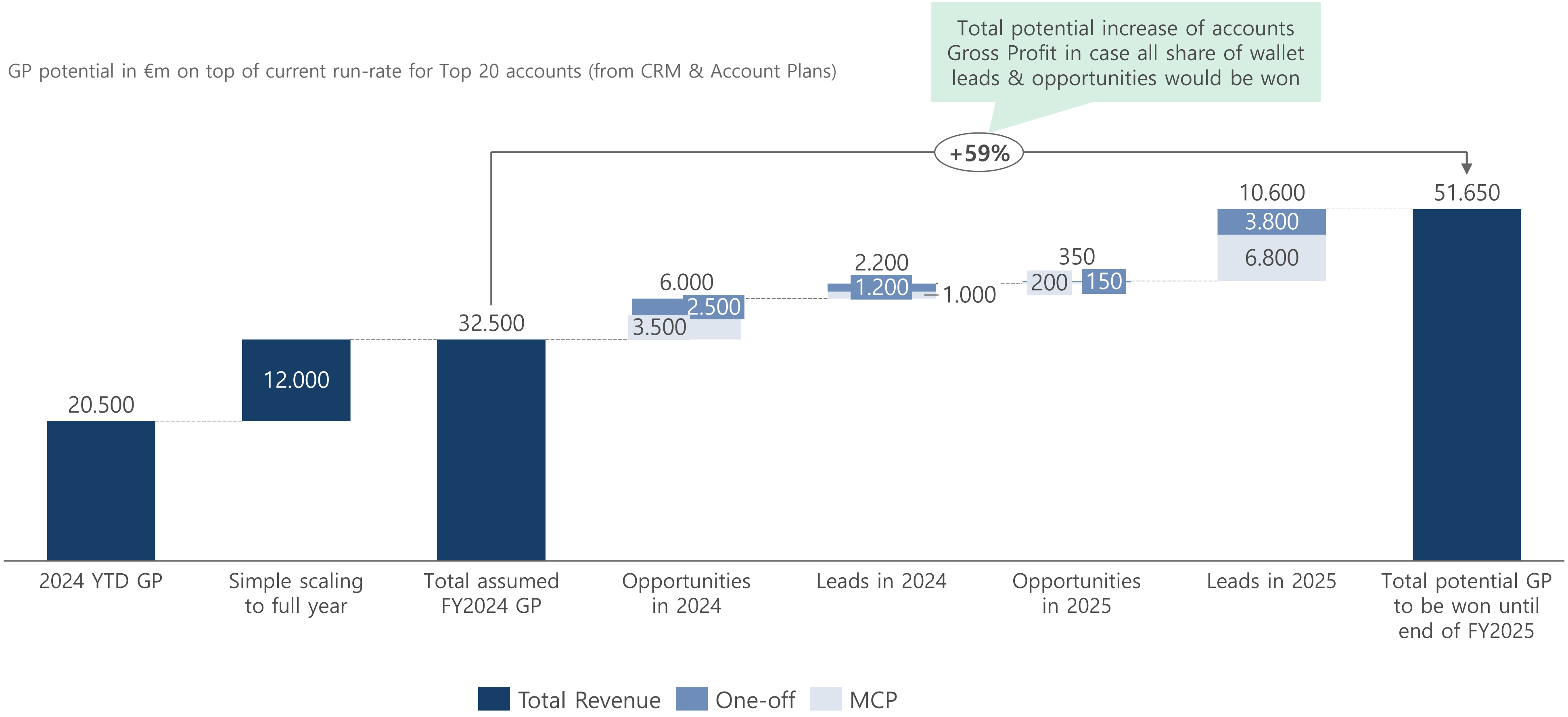


2 Actionable dashboards needed to increase effectiveness & efficiency



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)



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.

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

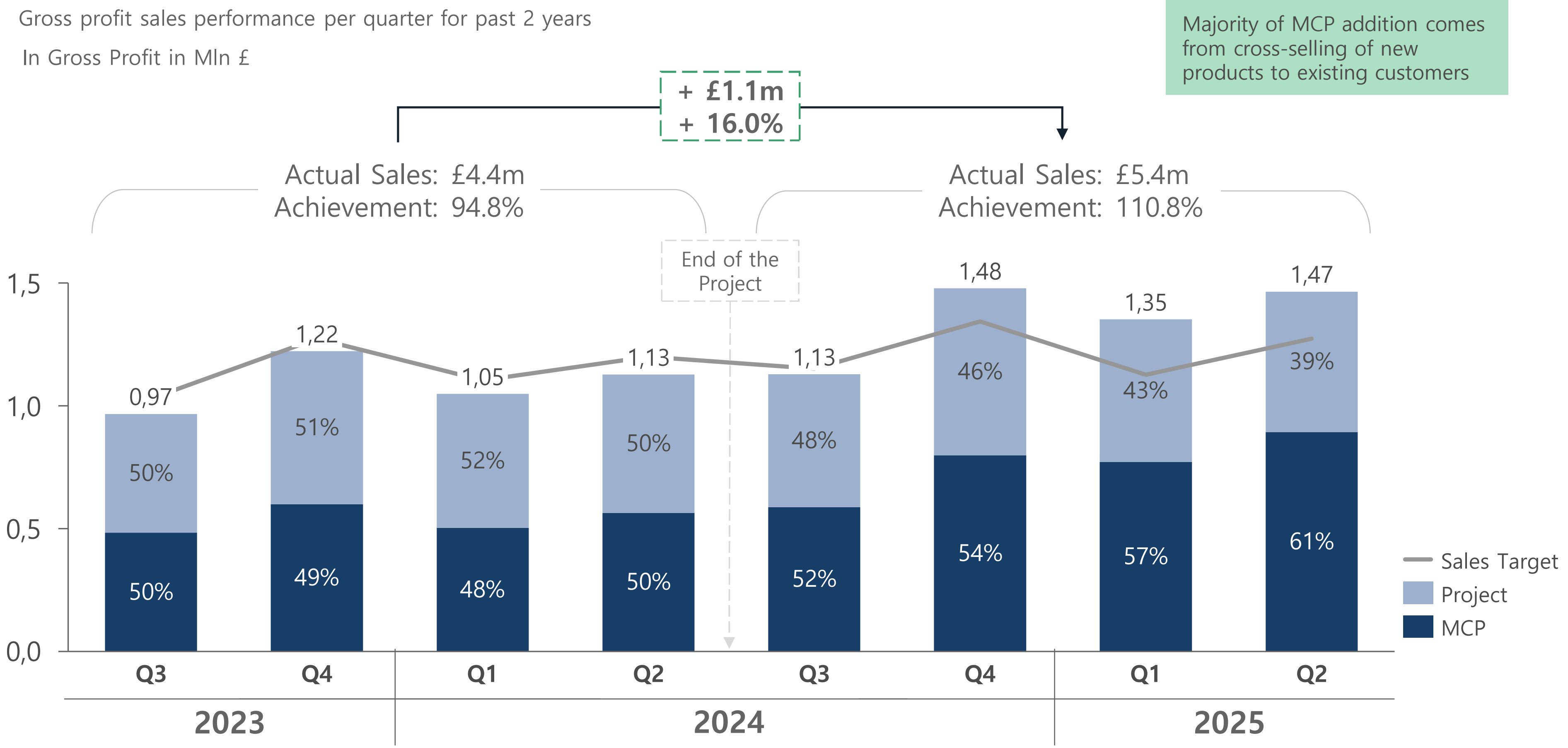
	Project team	Topic specialists consulted
Priority 1 Workstream	• Marketing employee • Account Manager 1 • Head of quotations • External party	• Head of Account Management • IT specialist • PowerBI resource • Rest of Account Mgmt. team
Priority 2 Workstream	• Head of Operations • Head of Controlling • 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

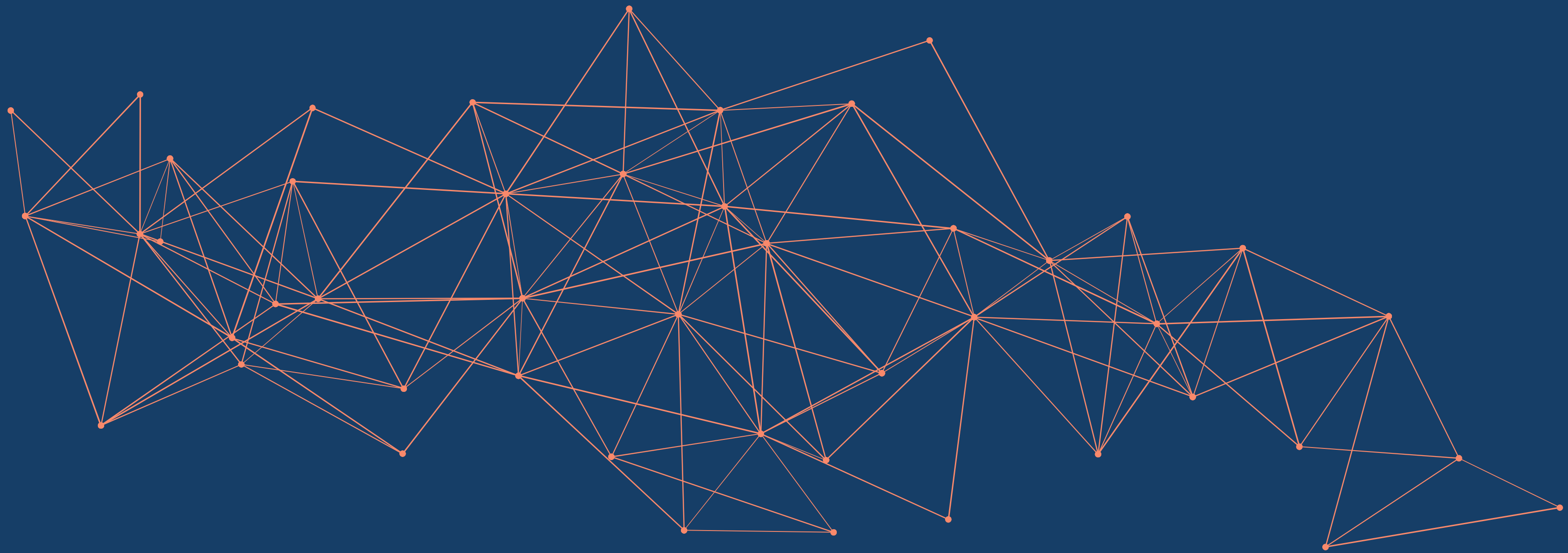
Workflow	Implemented activities	Outcome
Priority 1	1 Dashboard	Enhanced Steering
	2 CRM upgrade	Data driven way of working
Priority 2	3 Roles & Responsibilities	Clear internal processes & enhanced customer insights
	4 NPS Survey	
Priority 3	5 Battlecards	Time savings & enhanced sales capabilities
	6 Blueprint & Training Document	
	7 Centralized Quotation Process	

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

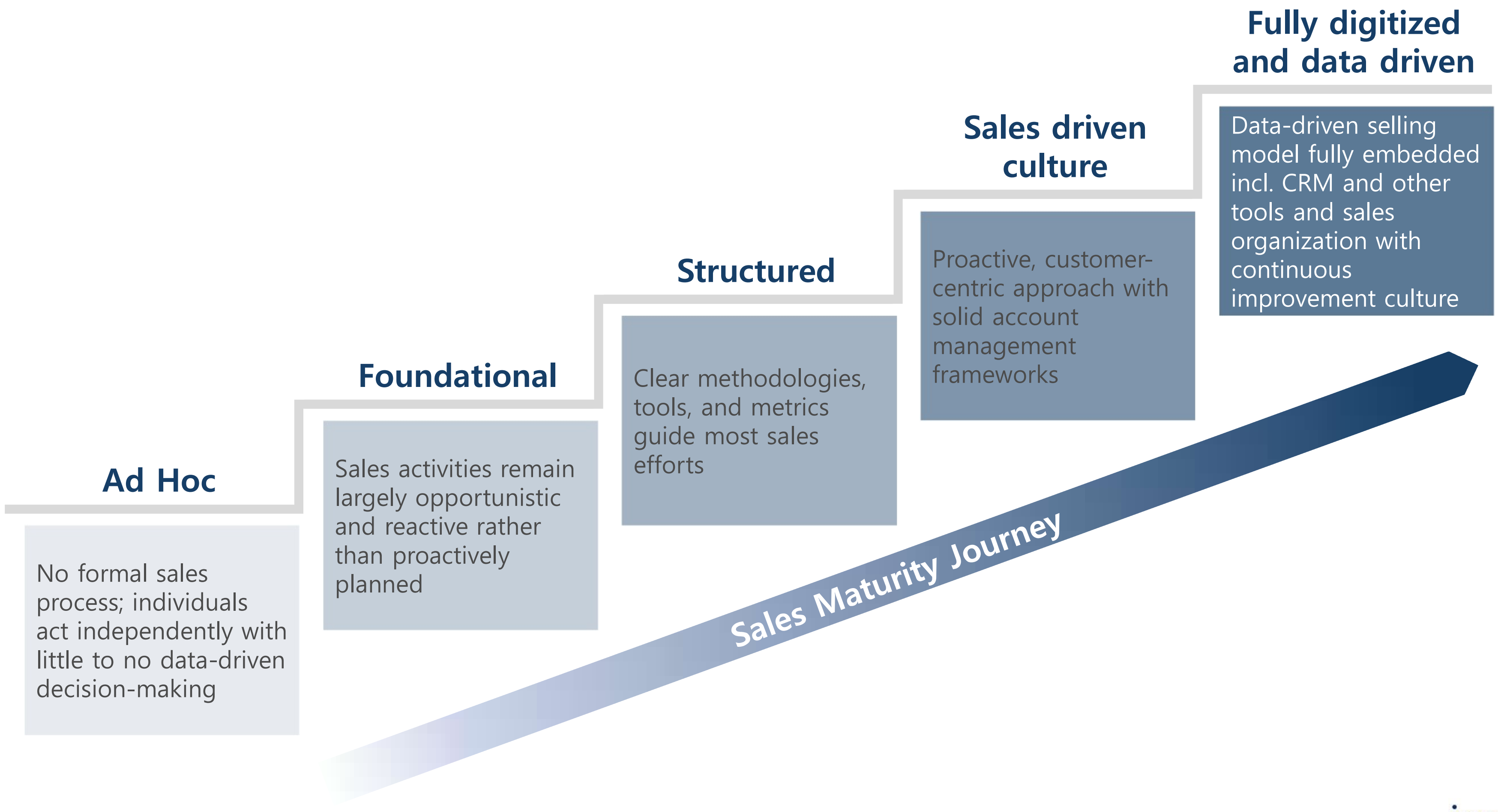
Majority of MCP addition comes from cross-selling of new products to existing customers



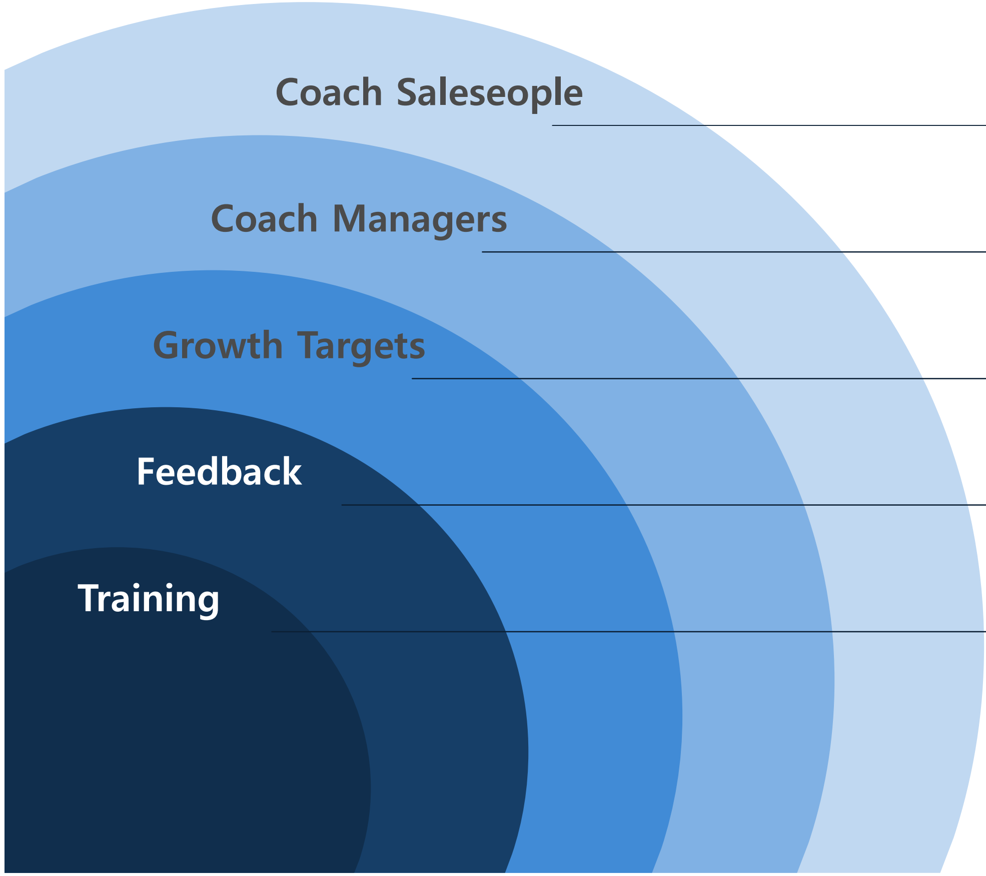
Customer example #2
Ongoing Training & Coaching of the Sales team



Recognizing your current stage on the sales maturity ladder helps you identify gaps and charts a clear path forward



Simple one-time training builds awareness, but full transformation requires coaching, leadership ownership, and embedded accountability



1:1 and group coaching of salespeople to **internalize learnings** and **drive improvement** in real-life sales situations

Train managers to **coach** and **lead commercial improvements** and make them responsible for **reinforcing** behavior and driving **accountability**

Create clear **development goals** per employee and set **commercial KPIs** (e.g., activity levels, pipeline quality, closing rates)

Feedback sessions post-training to share **best practices** among peers for **early quick wins and to coach the group**

Equip salespeople with **foundational skills and frameworks** (first level capability building)

Preparing the training required us to understand the organization better, but also means that salespeople define where they want to develop

- By combining top-down insights from **internal interviews** with bottom-up **development plans** from sales reps, we can tailor the training to address both **organizational priorities** and **personal growth** areas
- We **set individualized goals** to ensure every participant gains maximum value from the training

1. **Stakeholder interviews**
   - Speak with sales reps, account managers, department leaders to understand real-time challenges

2. **Individual development focus**
   - Each salesperson **reflects** on their current performance, **identifies** strengths and gaps, and **clarifies** the personal development they seek
     - We use the **GROW Framework** so salespeople can link their own objectives to targeted actions

3. **Define success metrics**
   - Align on specific KPIs to measure training impact

Illustrative

	Current Performance	Key Strengths	Areas for Development	GROW Plan	Planned Actions & Timeline
Salesperson A	- Current pipeline: 612k value - Win rate: 17% - Deal cycle: 24 days	- Relationship building - Product knowledge	- Objection handling in pricing negotiations - Strategic account planning	G: Increase quarterly win rate by 10% R: Typically lose deals on price O: Practice negotiation tactics, refine value messaging W: Commit to weekly role-plays & apply new tactics in upcoming RFPs	- Attend Negotiation Skills module - Book 1-on-1 coaching session - Reassess progress in 2 months

The training sessions were tailored to each individual group and had tangible guidance that people can use immediately

Collaborative curriculum development

- Develop core sales training modules tailored to Customer's environment

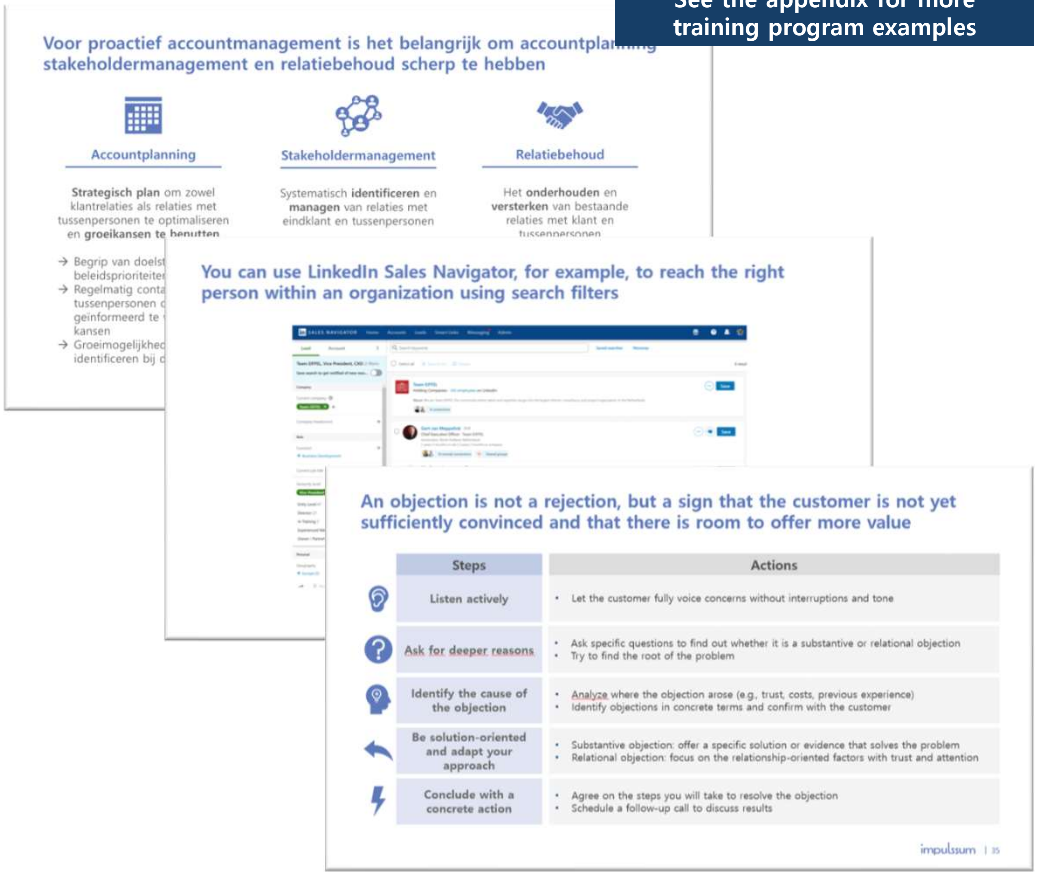
Expert feedback & alignment

- Conduct interviews with sales reps and BU heads to capture critical nuances and needs

Optimal group structure

- Total participants: ~12-15 salespeople plus BU heads
- Split the group between languages – English vs. German speaking group (find solution for 1 person that only speaks French)

See the appendix for more training program examples



Each training session gave an overview on the needed concepts, engages people to share experiences & have them start working with the concepts

Structured, Engaging Sessions

- **Five core modules** (each 120 minutes) delivered to 2 groups
- Key concepts, proven frameworks, and best practices, interactive discussions, real-world examples, and group sharing to promote peer learning

Pre-work & preparation

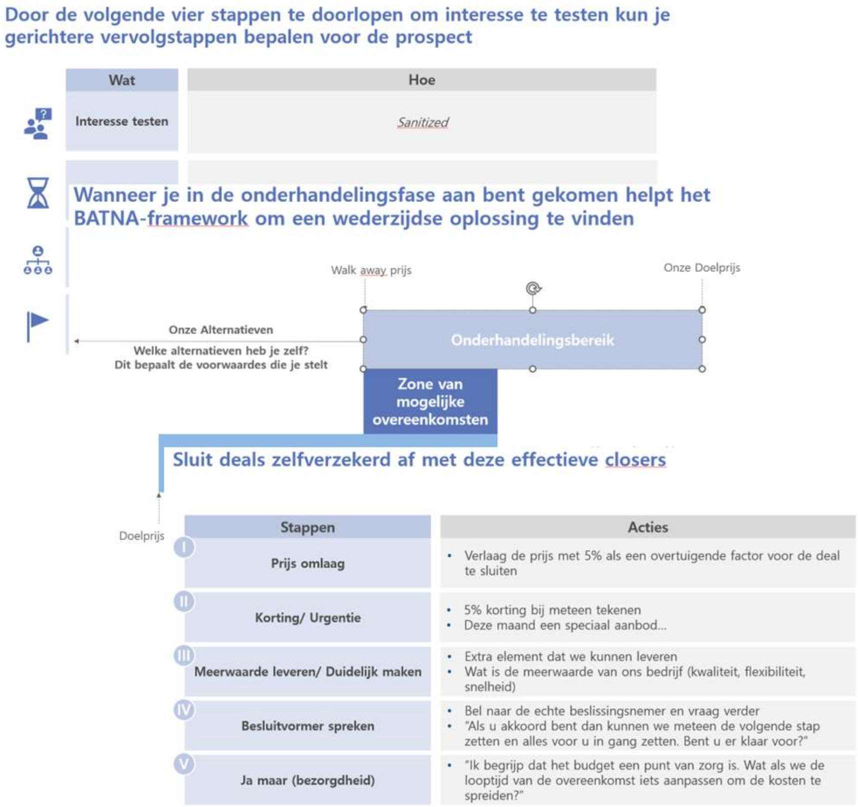
- Each module directly addresses live challenges and delivers actionable outcomes

On-demand learning materials

- **Training decks & handouts**: Accessible references for ongoing support and new hires' onboarding
- **Short video snippets (3–5 minutes)**: Quick-hit tutorials highlighting essential skills and reminders

Continuous feedback & adaptation

- After each session, participants provide feedback on content, pacing, and applicability
- Insights from these evaluations allow us to refine and tailor subsequent sessions

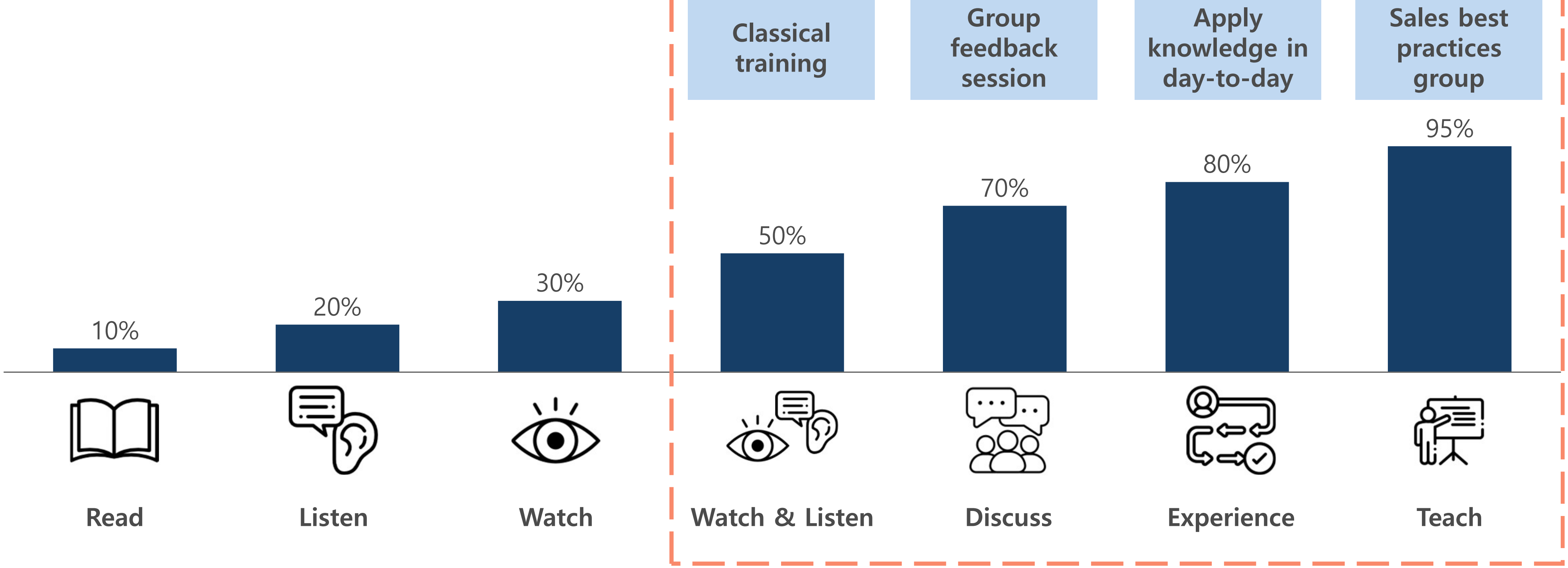


We split the training into 5 training sessions that each covered a different part of the sales process

	Content	Sales phases
I Lead identification and qualification	• Set the lead criteria (e.g. size of company, industry, etc) • Create your long list of target companies & create sales plan • Qualification of leads (BANT, MEDDICC, Probes, etc)	• Lead criteria • Lead identification • Qualification of leads
II Contact with (prospect) customers	• Use of different channels for 1st contact (LinkedIn, calls, etc.) • How to act in which channel/ contact point • How to build a relationship & identify opportunities	• Lead contacting • Identify & qualify opportunities
III Tangible/ Tactical sales tools	• How to set-up and use LinkedIn right • What other tools to use (several tools and methodologies: e.g. how to plan your day, FAB, LEAP, and others)	• Upper part of the funnel mainly
IV Objection handling & closing	• Similar standards for quotations • How to close a deal • How to handle objections	• Creating quotes & proposals • Closing deals
V Account Management	• How to create an account plan • Understand customer organization and build relationships • How to gather customer insights to create new opportunities	• Account plan • Create repeat business

The learning of the salesforce substantially increased by using sales insights for 1:1 on the job coaching on real live situations

Percentage of knowledge retained by different mediums of learning



Source: William Glasser's Learning Pyramid

Each of the 4 activities supported the journey towards adopting the new sales behaviour

	Description	Duration
Classical training	Classical training sessions meant to explain and transfer knowledge by presenting content that had been documented in written form as well. *(Watch & Listen)*	**90-120 minutes**
Group feedback session	Post-training sessions for open questions and discussions on the relevance and application of the learnings in day-to-day activities. *(Discuss)*	**60 minutes**
Applying knowledge in day-to-day	Defined use cases in each person's day-to-day activities before the start of the project. Scheduled monthly 1:1 coaching sessions to discuss progress and identify ways of improving.*(Experience)*	**Ongoing**
Sales best practices group	Monthly touch-points to discuss sales best practices with the team to create a peer-to-peer support system. Internal champions started owing certain topics. *(Teach)*	**30 minutes**

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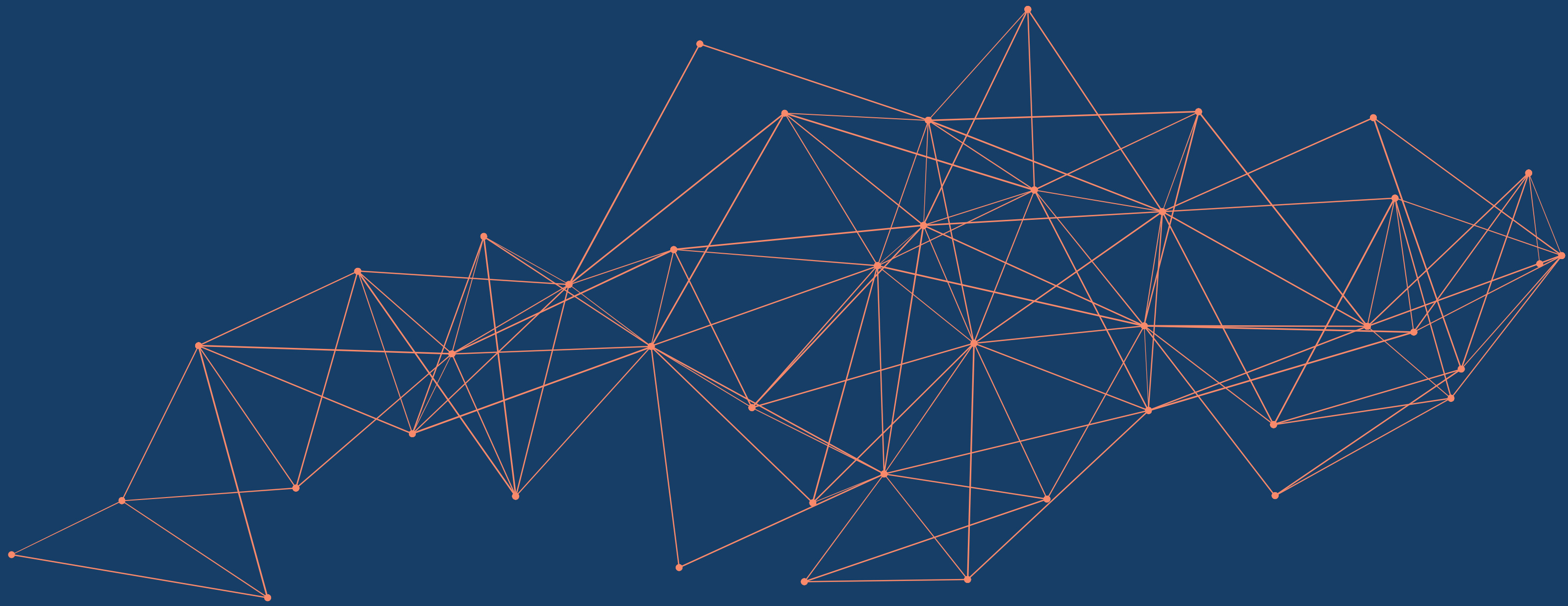

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