

Mentor Group Consulting Services

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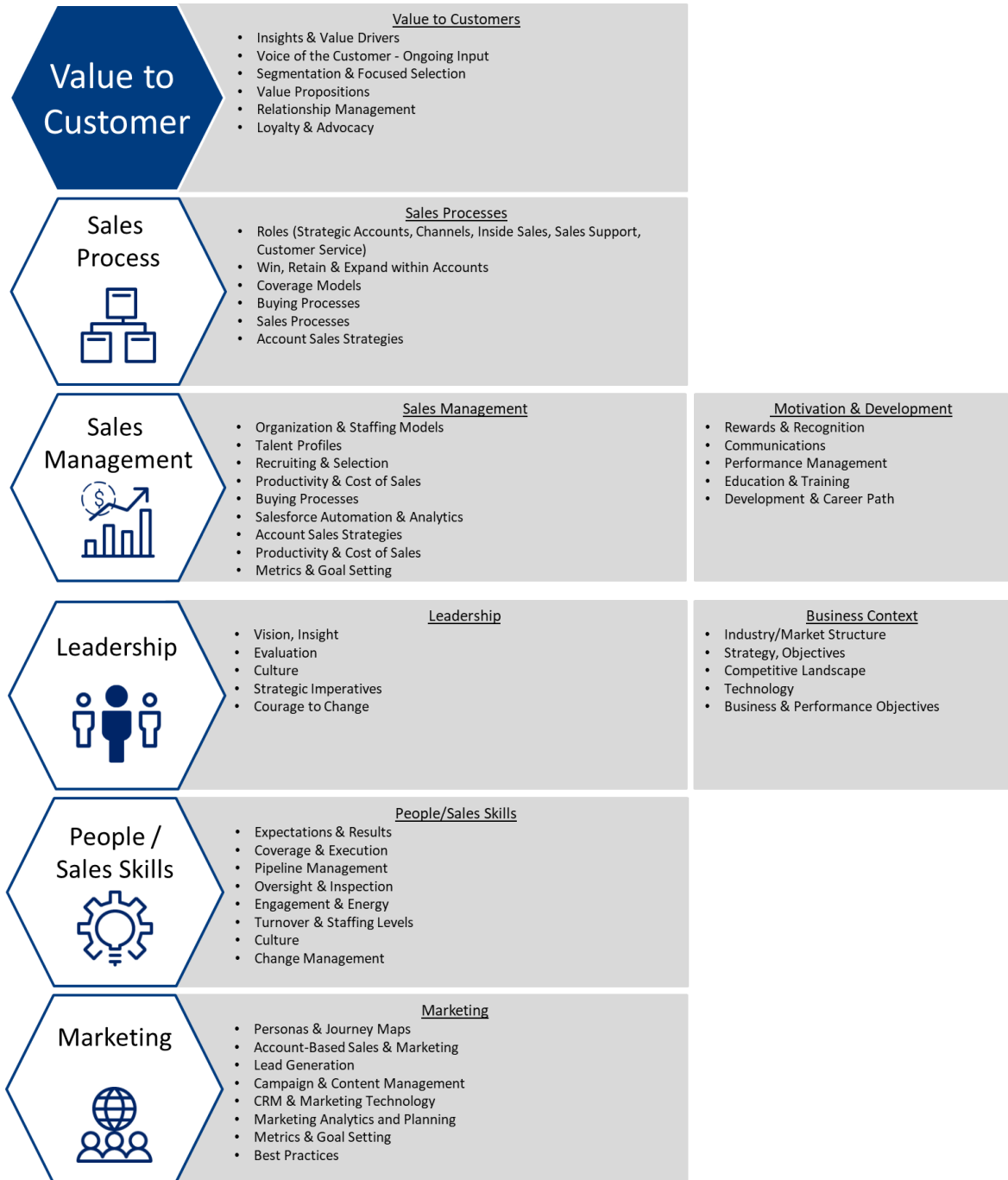
Mentor Consulting Services

Mentor Group brings together a holistic set of consulting, intellectual property, training, coaching, and technology to help our clients drive more rapid revenue growth. Underpinning all of our services is a team of highly-skilled and experienced senior sales effectiveness consultants. The Mentor Team of consultants has a unique blend of large company consulting roots - and have operated in the real world where performance each quarter is measured and matters. We bring rigor and discipline to the challenge of driving revenue growth, but our approach is anchored in pragmatism and is focused on achieving measurable results quickly.

While every client and every situation are different, we approach most engagements with a structured and rigorous methodology which includes the following steps, holistically or independently:

1. Start with an understanding of our client's business strategy and insure this is optimally translated to the best go-to-market strategy that is appropriate for the product/service, the market, the buyer, and the current stage of our client's life cycle.
2. Work with our clients to identify the key operating gaps and obstacles to improved sales performance and increased organic growth.
3. Work with the marketing team to provide the content and value-based messaging that helps salespeople actually close business, not just create awareness. We can work with you to develop world class account-based marketing strategies and plans.
4. We will team with sales leadership to suggest segmentation strategies within the sales organization and channel. We'll also work with marketing to provide what each type of salesperson needs for his/her customer base and given his/her capabilities to target, initiate and actually close sales, enabling the "Middle 60" tier to increase their productivity.
5. We can provide the Blueprint [™] for success – marketing and sales alignment, sales operations processes, dashboards and analytics, focused training to the sales team – all customized for customers' roles and buying personas -- along with the coaching and technology necessary to sustain the desired change. The Blueprint [™] will equip your firm with one version of the truth.
6. We design (or tailor) and implement common, repeatable, scalable and agile sales processes to enable your sales team to produce a predictable and scalable flow of opportunities, pipeline, and closed deals for both new and mature/commodity products/solutions.
7. We help you scale your selling capacity by organizing, managing and supporting sales resources in ways that enable all sales people to actually grow their books of business.
8. Enable scaling the capabilities of sales managers with Mentor's methodology, framework, tools, and processes so they can enable their sales team to be more efficient and effective.
9. Develop, assess and evaluate sales, sales management and sales enablement roles, talent, recruitment processes and tools to increase the likelihood of hiring the right talent to drive revenue and margin growth, consistent with the business and go-to-market strategies.
10. We will work with you to architect compensation strategies in ways that actually attract the right talent and drive growth in sales and profits, and salespeople's own earnings, not just protect the status quo (except where protecting the status quo is what needs to be done!).

Mentor Consulting Framework



The Mentor consultant teams consists of senior and very experienced consulting and operating resources ([bios](#))

The foundation of our approach is practical and client-focused, including ...

- A thorough understanding of each client's business and sales models
- Use of proven conceptual frameworks and robust data analyses
- Comparison of each client to best practices in high performing sales organizations
- Working with our clients to insure the desired changes are implemented and adopted globally though coaching and technology

Mentor Private Equity Practice

Mentor also has developed a sub-consulting practice for financial sponsors and their portfolio companies. We believe that much of what can be done to reduce operating costs and improve efficiency from organizations has largely been accomplished. Thus, along with M&A, organic revenue growth becomes the most important lever for value creation and the principal vehicle for enhancement of portfolio company performance.

We believe our services will accelerate a portfolio company's revenue growth trajectory and meaningfully reduce the time of realization of return on the equity investment. We have done this for the portfolio companies of private equity firms many times.

In addition to performing all we do for the portfolio companies of financial sponsors post close, we also are capable of a wide variety of assistance during a due diligence process, including:

- Full Sales Productivity Diagnostic
- Go to Market Strategy
- Organization structure/coverage/capacity
- Optimizing role definition, goals/metrics, hiring profiles
- Marketing/Sales Alignment
- Sales management
 - Talent
 - Process
 - Reporting and tools
- Sales talent assessment
 - Capability and potential
 - Recruitment model
- Messaging Effectiveness
- Customer/client audit (voice of the customer)
- Compensation analysis and comp plan design
- Customer success/account management
- Sales forecasting/metrics/pipeline fidelity

If you wish to learn more about Mentor's consulting capabilities, [click here...](#)

The Mentor Sales Performance Diagnostic Overview

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Today's Sales Challenges

People

Why are my sales teams not performing to plan or sticking with the company?

Process

Why are we not hitting our revenue targets?

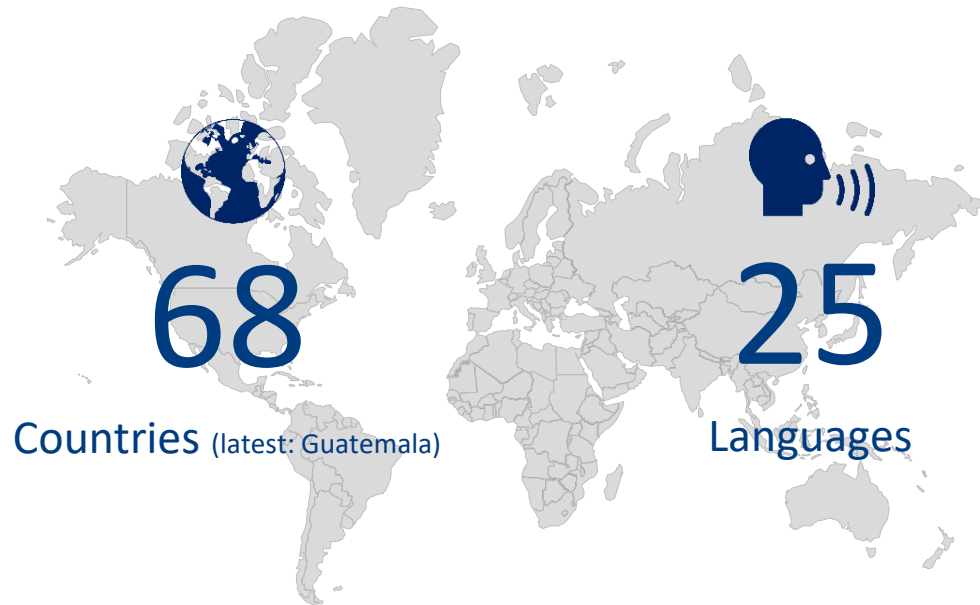
Technology

Why aren't we getting the expected return on investment from all of these systems we have?

***Solving for One Variable
Moves the Needle...***

...But It Doesn't Change the Game!

Why Mentor Group?

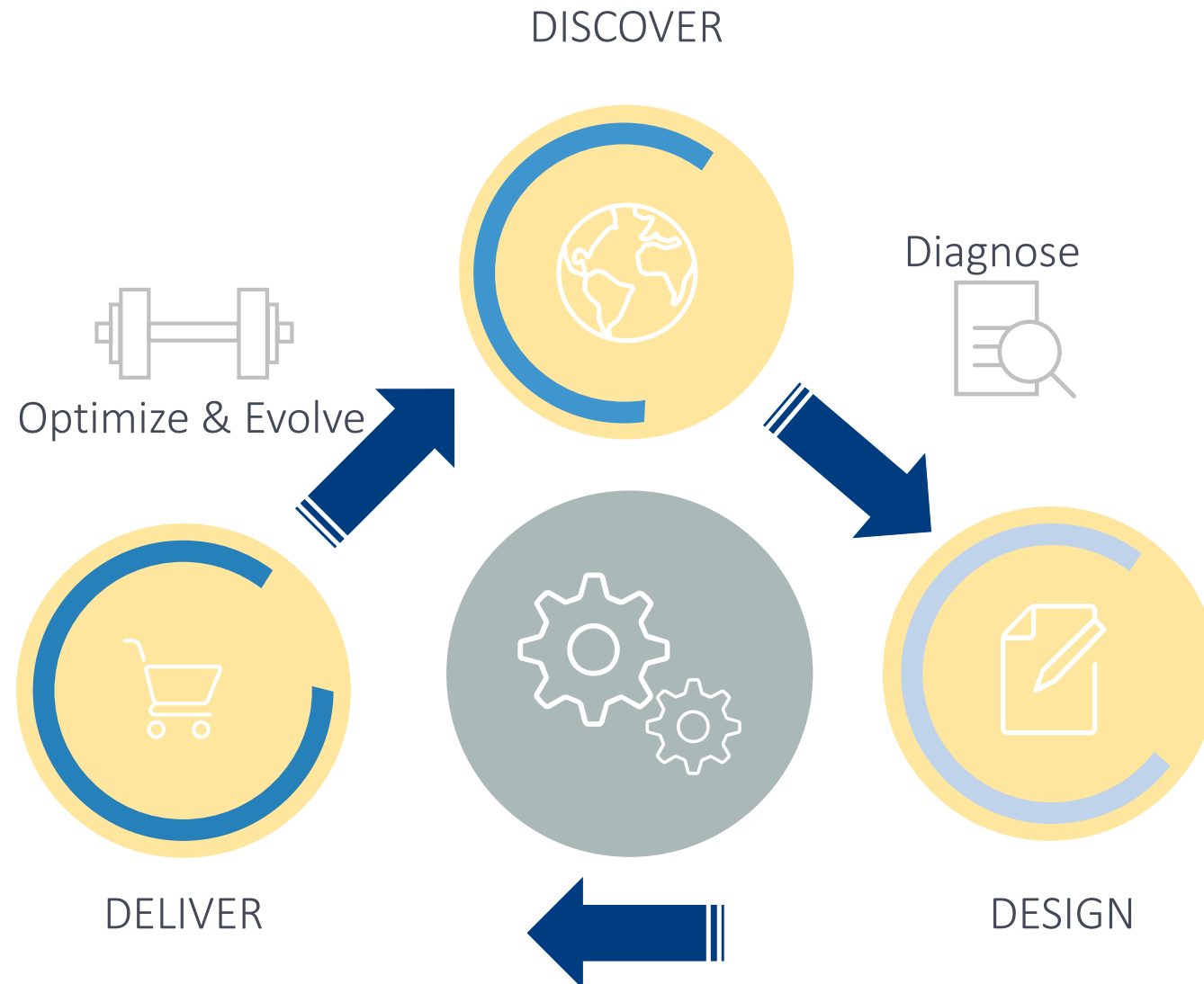


We are a company dedicated to *transforming* sales organizations through the holistic integration and optimization of *people, process* and *technology*.

Key Clients circa 1 million strong sales community

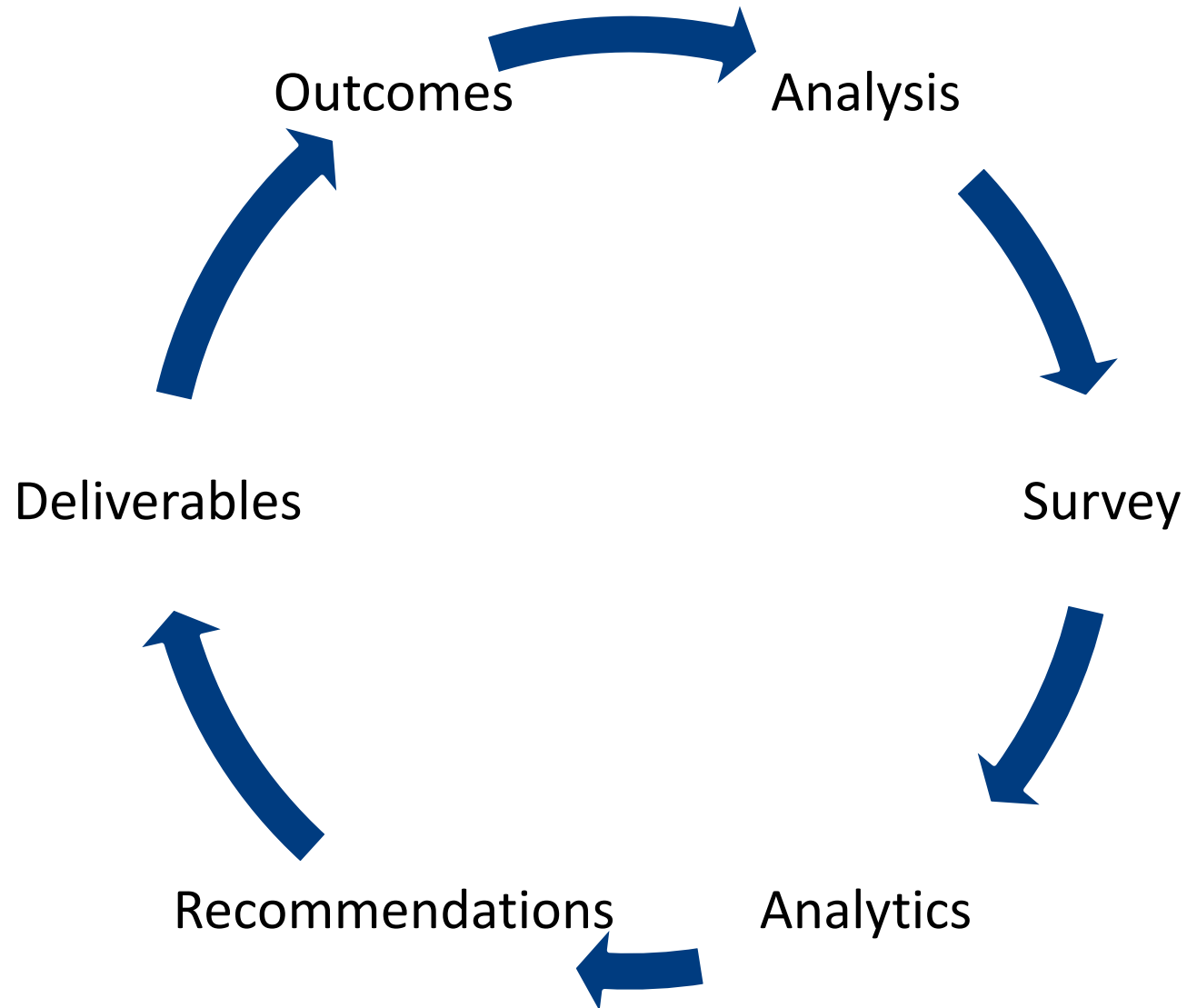


Our Approach: Three Steps to Success



The Mentor
Sales Performance Diagnostic
identifies ALL of the issues that
may be holding back your
Opportunity for Excellence!

The Sales Performance Diagnostic Approach



Sales Performance Diagnostic - 1

Analysis



- Sales Strategy
 - Revenue/units/transactions
 - Product mix/Solution offerings
 - Channel model
 - Sales process/"value selling" methodology
- Segmentation
 - Geography, Industry, Company Size
 - Cross-sell/upsell/renewals
- Sales Deployment
 - Organizational model
 - Talent analytics
 - Talent analysis
 - Sales effectiveness approach
- Technology maturity and usage

Survey



- Leadership 1:1 interviews
- Sales and sales support personnel survey (online or interview sampling)

Analytics



- Historical revenue and transactions
- Future pipeline projection model
- Demand generation effectiveness
- Account prioritization
- Territory design metrics
- Organizational modeling
- Compensation analysis
- Sales process productivity
- Sales effectiveness (training results)
- Benchmark against best practice

Sales Performance Diagnostic - 2

Recommendations

- Strategy/Tactics
 - Go to market approach
 - Organizational design
 - Product/solution mix
- Talent Success profile
- Sales process blueprint
 - Buyer & Seller Process
 - Sales Methodology (value-based)
 - Sales and support roles
 - Meetings model
- Sales effectiveness
 - Training model/learning pathways
 - Coaching model
- Technology enhancements
 - CRM, Comp, Analytics...

Deliverables

- “Blueprint” that defines sales process and supporting activities
- Talent Success Profile that outlines the results, activities, behaviours, backgrounds and competencies of top performers
- Training materials for rollout and ongoing learning
- Micro-learning platform to encourage capability exploration and expansion
- Playbooks to drive sustainment
- Coaching model to drive continuous improvement
- Analytics solution to track results and recommend areas for improvement
- Compensation plan design and administration model
- Technology recommendations as needed

Potential Outcomes

- Increase Revenue overall
- Increase Market Penetration
- Improve Product Mix by Customer
- Increase Future Pipeline
- Accelerated Quality Lead Generation
- Increase Renewal Rates
- Reduce Expense
- Reduce Attrition
- Increase Sales Productivity
- Accelerate Technology Implementation or optimize current technology utilization

Sales Performance Analytics (example)

SBU

Segment

Ops Segment

Territory

Subterritory

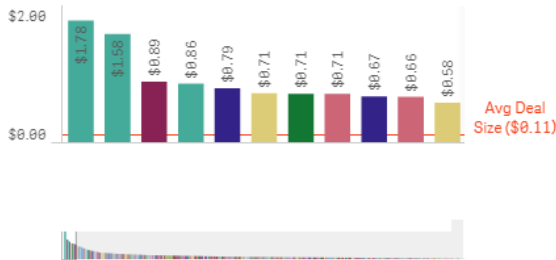
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4 of 6 selected in Stage

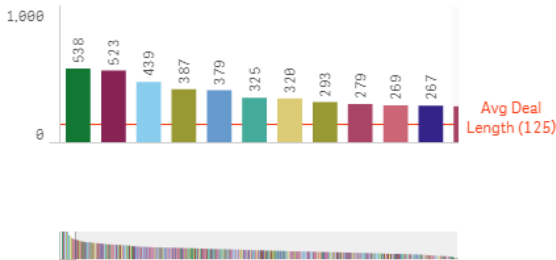
Quarter

Total Pipeline
\$3,225.48^{12,295}
Number of Opptys

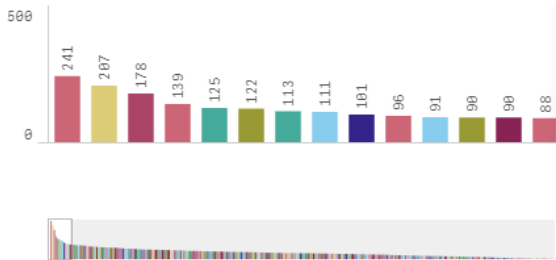
Average Deal Size



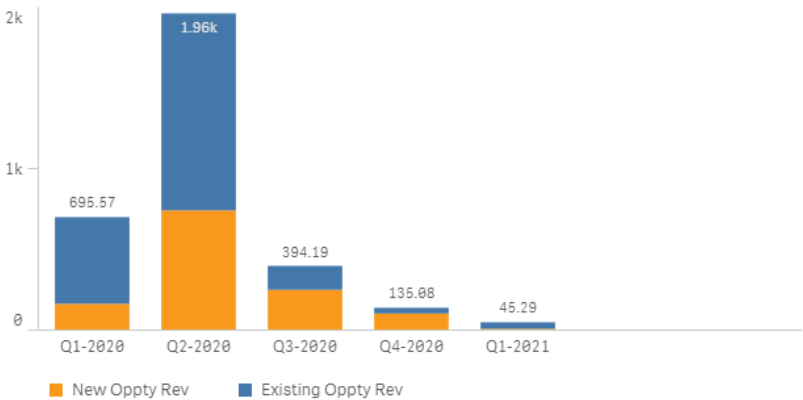
Average Deal Length



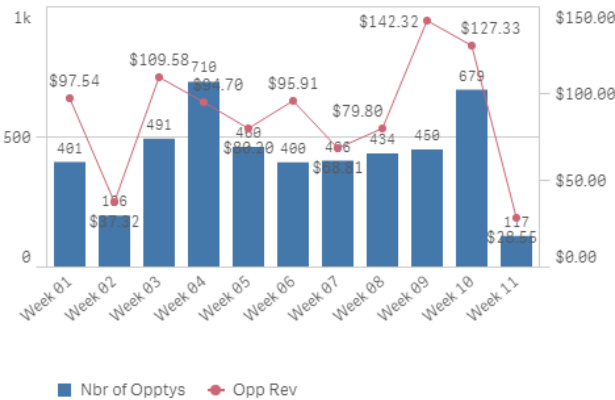
Deals without Standalone nor Embedded Services



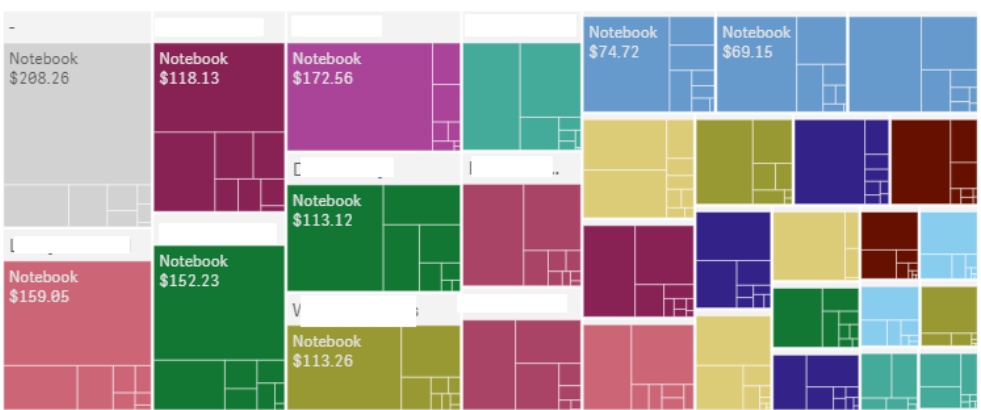
New and Existing Pipeline by Qtr



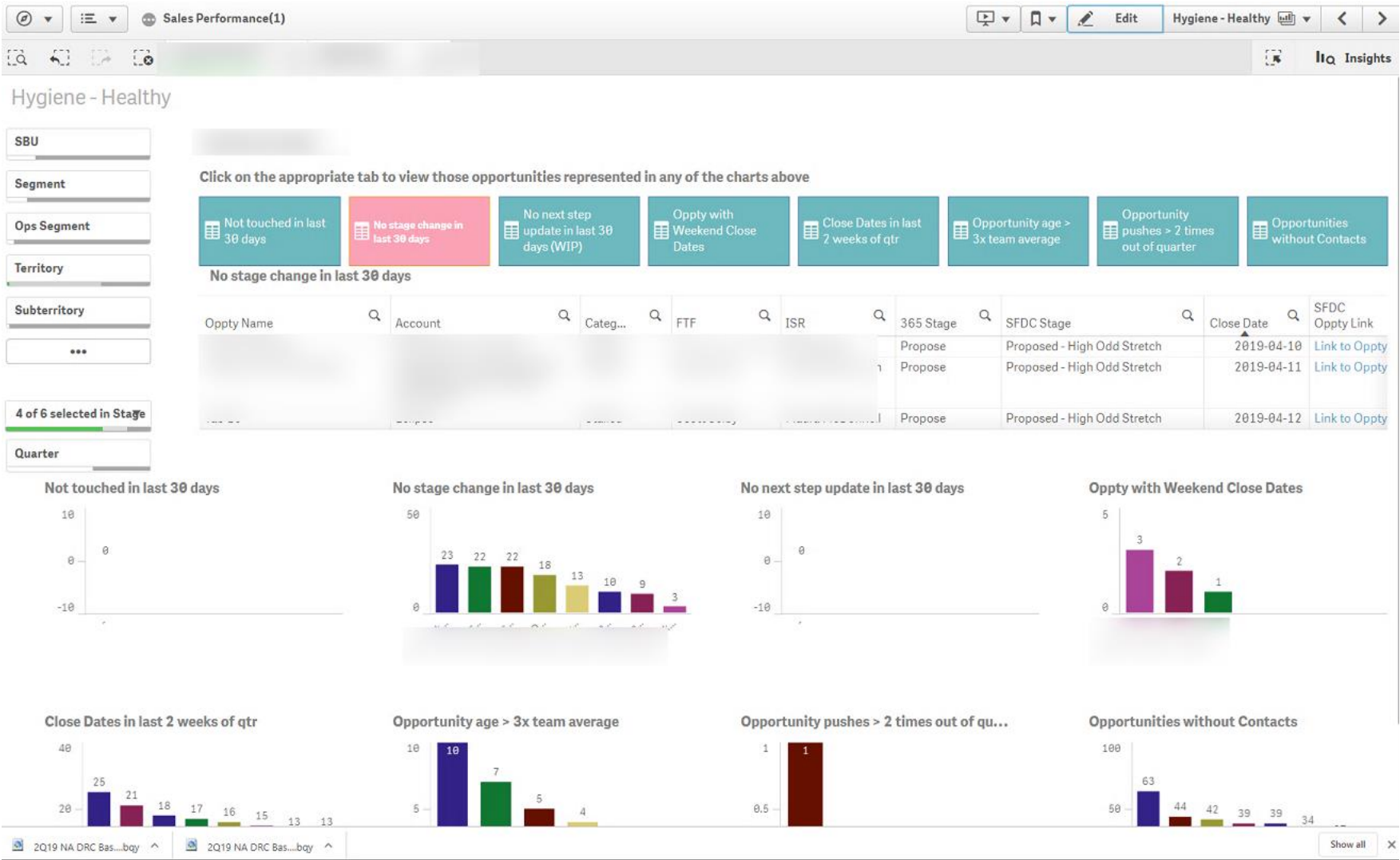
New Opportunities created by Week this Qtr



Product family Heatmap



Sales Performance Analytics (example)



Representative Bios

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**Location and Time Zone**

Chicago, IL USA

Time Zone: USA Central

Primary Language

- English

Sector Experience

- Pharma/Biotech
- Professional Services
- Manufacturing

Sherri is a strategic business consultant, human resources expert and entrepreneur with proven results in start-ups to Fortune 500 organizations. Sherri helps client succeed by selecting and developing the right leaders, engaging passionate teams and implementing innovative talent strategies. Sherri's work history consists of:

- Consulting: Mercer, Towers Watson (Client Manager); Dovetail Talent & Organization Advisors (Partner)
- Internal HR: Horizon Pharma (VP, Talent Strategy); Scotts Miracle Gro, Chase, The Limited Inc. (Various HR roles)
- Entrepreneurial: The Silken Tent (Owner); Capital H Group (VP, Business Development); NAPTA (Sales Representative, IL and WI)

Specialist areas of work

- High Growth Business Success (Over 80% of career)
- M&A Integration (over 20 transactions)
- Culture & Engagement (8 top workplace awards)
- Leadership Assessment, Selection and Coaching (certified Hogan assessor)

Recent Projects:

- Created pharma company's first HR and culture strategy to align with growth drivers, resulting in a job offer and 400% net revenue increase over four years
- Responsible for human capital due diligence & integration of \$800m global acquisition; closed in 5 weeks, retained critical talent and achieved 458% revenue growth over two years
- Leveraged talent analytics to identify key performance attributes of high performing sales representatives, reducing turnover 80%
- Facilitated business strategy articulation for \$200m manufacturer to address industry wide technology changes; engaged employee-led teams that developed operational plans to successfully implement the new strategy
- Conducted C-Suite leadership assessment, development and coaching within a private equity backed roll-up of three engineering firms, leading to successful exit



Location: Chicago

Time Zone: Central Time Zone

Primary Language

- English

Sector Experience

- Distribution
- Healthcare products/ services
- Technology/Software
- Professional Services
- Travel, Hospitality & Sports
- Manufacturing

For more than 30 years, Steve has consulted to senior management teams globally on Sales Compensation and Sales Organization Performance issues with particular emphasis on helping clients navigate through the difficult process of driving change in a sales environment. Steve started his career in marketing and strategy and approaches every client situation from a total business perspective. Steve was a partner and leader of Mercer's Sales Effectiveness consulting business in North America for more than fifteen years and was also a Partner in Aon Hewitt's Sales Effectiveness consulting business before starting Steve Grossman & Associates in January, 2015. Steve holds a bachelor's degree in Mechanical Engineering from Tufts University and an MBA from Boston University. He is a Certified Management Consultant (CMC).

Specialist areas of work

- Sales Compensation
- Sales Effectiveness Assessment
- Sales Roles and Organization
- Management Process
- Change Management

Recent Projects:

- Sales Compensation
 - Created a simpler, more focused family of sales compensation plans
 - *Exceeded revenue objectives across sales units for first time in five years*
- Sales Reorganization
 - Segmented sales organization to align with strategy and customer bases
 - Reorganized Sales:
 - New sales roles, by segment;
 - New management roles;
 - New family of sales compensation plans
 - Oversaw execution of change process
 - *Reduced cost of sales, by segment*
 - *Increased penetration and growth across segments*

**Location and Time Zone**

Chicago, Central Time

Primary Language

- English

Sector Experience

- B2B Industrial
- B2B Distribution
- High-Tech
- Business Services
- Publishing / Media
- Financial Services
- Consumer Goods
- Medical Devices
- Packaging
- Building Products
- Chemicals

Alistair started his career in the UK in sales operations roles for publicly quoted companies, before immigrating to the USA to start a 20-year career in sales consulting. He has held the position of Principal and Associate Partner in leading Midwest sales consulting firms such as Aon Hewitt and The Alexander Group, and the role of VP WW Sales Operations for \$500MM CommVault Systems. He holds a BSc. from King's College, University of London and an MBA from the Manchester Business School.

- Sales Model Effectiveness Assessments
- Sales Compensation Plan Redesign
- Standing up advanced Sales Operations departments and programs
- Sales Role and Organizational Design
- Complex Sales Transformation and Change Management programs

Recent Projects:

- Delivered 23% revenue growth within 21 months for a \$150MM newly acquired PE portfolio company.
 - Accompanying 10% reduction in force, with cost savings used to fund extra pre- and post-sales resources
 - Restructuring of sales territories to optimize account workloads.
 - Introduction of an inside sales team to handle smaller accounts.
 - Redesign of the sales compensation plans
 - Regional sales manager workshop and toolkit introduced to drive high-performance sales culture
- Upgraded the day-to-day sales execution blueprint for a \$300MM distributor, resulting in 17% year-on-year revenue growth. Identified the company's top 3 "sales plays" for hitting the annual revenue number. Developed and introduced individual sales rep performance metrics and a talent ranking system (i.e. A-C player rep ranking system). Front line sales managers tasked with co-selling and agile coaching of sales reps against these performance metrics, to move B-player reps to A-player performance levels.
- Worked with a \$3B medical diagnostics equipment manufacturer to implement a global sales compensation harmonization program, for optimized profit driver alignment and global governance and reporting. Worked with corporate resources and 11 country management teams to implement upgraded sales compensation plans and governance programs.
- 24-month transformation of a distributor sales organization, which included the introduction of redesigned sales manager job roles, a national accounts program, and upgraded sales recruiting, on-boarding and professional development programs. Annual revenue growth increased from -3% to 6%, national account revenues doubled to \$50MM, and sales team staff turnover fell from 18% to 14%



Location and Time Zone

USA

Time Zone: EST

Primary Language

- English

Sector Experience

- Technology Hardware & Software
- Technology Services
- Manufacturing
- Chemical
- Retail

Steve Promisel is an experienced operations leader with a focus on the application of data analytics for process optimization, sales forecasting, compensation planning and capacity management. His disciplined and passionate approach to maximizing productivity has led to a significant impact in improving performance and reducing attrition within many companies.

Steve has held several senior operations roles at companies like Qlik, Oracle, BEA Systems and Software AG. For the first part of his career, he worked with many Fortune 1000 companies in consulting, market strategy, supply chain management and learning management. Client projects included work with Reebok, Elizabeth Arden, Dow Chemical, P&G and Lever Brothers, plus some public sector work.

His consultative approach, balanced with a keen ability to translate complex technical issues to business solutions, has resulted in many highly satisfied customers, both internal and external.

Steve's unique approach to problem solving developed with his B.S. in Chemical Engineering from the University of Rochester and evolved with his M.S. in Engineering Management with a concentration in Operations Research from The George Washington University.

- Sales Process & Methodology Design & Implementation
- Business Analytics
- Operations Management
- Sales Enablement
- Customer Success Management
- Sales Leader Development and Coaching
- Presentations and Communications
- Meeting Facilitation

Recent Projects:

- Marketing Software company – Sales Blueprint update, sales analytics (Tableau-based), training development & delivery, sales team coaching, sales enablement program design
 - Faster time to first sale, increased pipeline development, more comprehensive training approach across USA, EMEA and ANZ.
- Global Technology Company – Sales Blueprint development, sales analytics (Qlik-based), training program development & delivery, and sales leader coaching
 - Improved Salesforce.com hygiene, increased future quarter pipeline, plus early indications that increased sphere of influence on larger accounts are leading to larger deals.
- Engineering Company – recent graduate training – persuasion & influencing and presentation skills
 - New employees with deep technical backgrounds are more comfortable presenting their ideas and projects to senior management
- Tele Communications company (Atlanta) – Hunting New Business training program



New York, NY

Time Zone: EDT

Primary Language

- English

Other Languages

- Struggling with Japanese

Sector Experience

- Technology
- Media & Entertainment
- Services
- B2C

Ron has extensive senior-level global marketing experience and has produced significant business results for a wide range of clients, in large enterprises and start-ups, across vertical industries, with deep experience in technology marketing, and in particular, in Japan/Asia Pacific. Ron has led marketing organizations in senior-level positions for companies such as IBM, Microsoft, and several private and start-up technology organizations. Ron's consultancy, [rsg.nyc](#) Marketing Consultants, focuses on account-based acceleration and expansion through marketing and sales alignment, strategic go-to-market planning, and a sharp focus on deriving and delivering value to customers, with measurable results.

Specialist areas of work

- Customer and Market Insights
- Strategic Go-to-Market Planning and Execution
- Account-Based Sales and Marketing
- Sales and Marketing Alignment
- Global Expertise

Recent Projects:

- Extensive one-on-one research with Customers, Sales, Channel and Executive Leadership for Global Company
 - Provided foundation and insights for strategic business and marketing plan. Led to restructuring of sales organization, improvement in channel relationships, and development of new capability to address more profitable market segments.
- Strategic Digital Marketing Transformation Plan for Global Company
 - Revealed benefits of shift toward solutions-based, business-value-driven approach and need to engage decision-makers differently, using omnichannel methods. Currently undergoing revamping of sales and marketing go-to-market approach, creation of new website, and solutions-based content.
- "Marketing Forensics" for Japan Division of Leading Global Cloud Company
 - Growth in Japan lagged the rest of world and the reasons why, despite wealth of analytics, was unknown. Investigation led to improved sales and marketing planning, segment plans, and coordinated touch points, which resulted in a +10 percentage-point increase in YoY growth rates within six months.
- Account-Based, C-Level Engagement Program for Global Tech Company
 - Shifted company approach from product-driven to business-value-driven, which opened doors to conversations with C-level decision makers. Led Global Executive Briefing Series, which further positioned company as the industry thought leader. Drove significant increases in opportunity pipeline value and closed revenue from both current and new clients.



Dan started his career at General Electric, where he entered its sales training program after graduating college. He served in a variety of sales and sales management roles at GE in four different US cities over eight years with the company.

Dan is a serial entrepreneur with more than 25 years of experience. He has been the founder and CEO of three private equity-backed businesses and was the number two executive for a fourth. The three previous companies achieved high rankings on the Inc. 500 list of fastest growing private companies, with Parson Group landing the coveted #1 spot. In addition to Dan's entrepreneurial ventures, he has also provided consulting and interim management to a variety of start-ups and large public companies.

GrowthPlay, his previous venture grew by acquisition and robust organic growth from 1 person in 2014 to about 140 employees spread throughout the United States in six physical offices at the beginning of 2017. GrowthPlay achieved the #22 overall ranking on the 2017 Inc. 500 list, and the #1 ranking overall in the Business Products and Services category.

Prior to forming GrowthPlay, Dan was the co-founder and CEO of Capital H Group LLC. Capital H Group was a private equity backed global human capital consulting firm founded in 2003 and sold in 2009. Dan formed Capital H after being founder and CEO of Parson Group, LLC. Parson Group focused on consulting services for the finance, accounting and business systems areas of large organizations.

Before forming Parson Group, Dan was the number two executive for Alternative Resources Corporation (ARC). He joined ARC during its second year of business as head of field sales and operations and was responsible for organic expansion that grew revenues from less than \$3 million in 1989 to over \$100 million in 1994. ARC became a public company in May of 1994 and became the 2nd best performing IPO on NASDAQ for that year.