

THE BUSY LEADER'S GUIDE TO SALES TRANSFORMATION

Improved results. Period.



57%

SALES FORCE EXPECTED TO
MISS QUOTA THIS YEAR
(SALESFORCE)

5X

IT COSTS 5X MORE TO SELL A
NEW CUSTOMER THAN RETAIN AN
EXISTING CUSTOMER (HUIFY)

DID YOU KNOW

THE BEST LEADERS & TEAMS ARE CONSTANTLY EVOLVING

The marketplace, your customers, your business, your employees are always changing, so shouldn't your Sales & Account Management strategy be as well?

Follow this guide for the FIVE STEPS TO BETTER RESULTS with new and existing customers.

Need more help? This is what we eat for breakfast.
[Contact Us](#) or [schedule a free 30-minute intro meeting](#).

FIVE STEPS TO BETTER RESULTS WITH NEW AND EXISTING CUSTOMERS

STEP 1: MAKE THE CASE FOR CHANGE

Clarify why you are changing and who you need on board.

STEP 3: BUILD A VISION

Create a clear vision of where you want to go.

STEP 5: MEASURE. ADJUST & CELEBRATE

Monitor the metrics that tell you if you're winning and take action.

STEP 2: GAUGE CURRENT STATE

Determine where you are now.

STEP 4: BRIDGE THE GAP

Identify and prioritize what you need to move from current to future state.

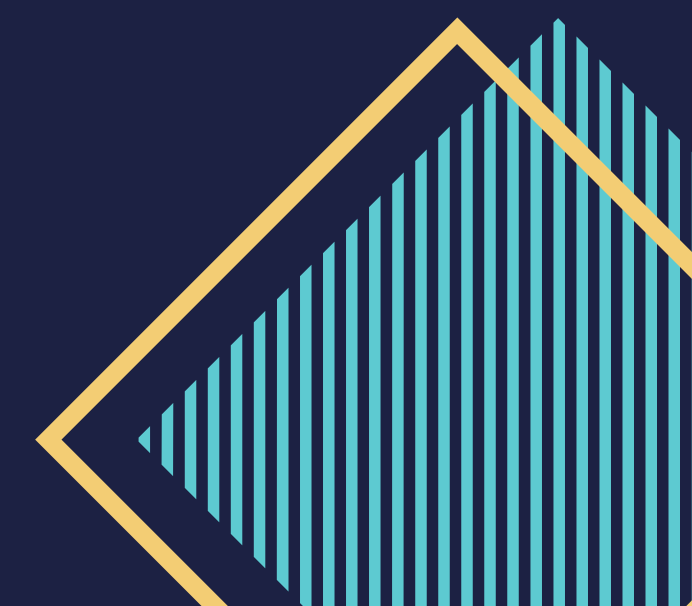


STEP 1: MAKE THE CASE FOR CHANGE

Before you get started, ask yourself:

- What's causing you to want improvement?
- What do others think?
- Whose buy-in do you need?

Whether you're seeking incremental or sweeping change, it will take some work to get there. Take the time to build the case for change before you get started to save yourself headaches and stalls later on.



STEP 2: GAUGE CURRENT STATE

You have to know where you are in order to plan a path to where you're going. No matter how long you've worked there or how well you think your grasp on the business is, try to start fresh and look at it holistically. Here are three areas you'll want to consider:

KEY METRICS

Results like goal attainment, employee turnover, & customer attrition
Leading Indicators like sales opportunities & customer feedback

PERSPECTIVES

Other leaders
Employees
Customers

TRENDS

Things that are happening in your industry or market to which you should respond, prepare for, or leverage.



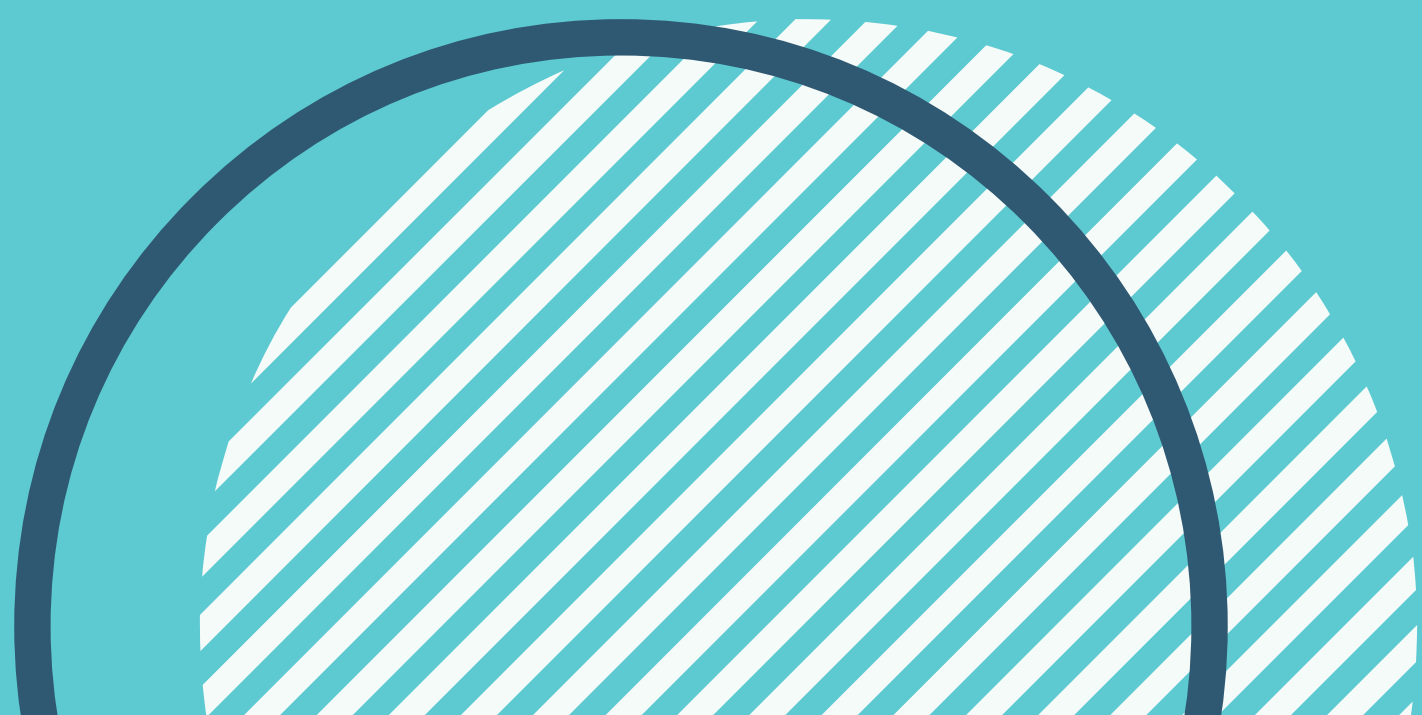
“If you are working on something that you really care about, you don’t have to be pushed. The vision pulls you.”

STEVE JOBS



STEP 3: BUILD A VISION

Regardless of the scope of the shift you are making, it's unlikely you can do it alone. Create a clear vision that will not only communicate your desired goal, but inspire others to get on board. Like the quote above, create a vision that will pull you, and pull others as well!

- How does your sales function need to support your company strategy?
 - What do you want your future sales team to look like?
 - What success measures will show that you're winning?
 - What would you love your fellow leaders, your board, your investors, your customers, to say about your sales function?
- 



STEP 4: BRIDGE THE GAP

How far is your current state from your future vision? Realistically, what can you do in the next year to get there? Two years? Three years?

YOU HAVE MULTIPLE "LEVERS" TO PULL

Consider shifts in your strategy, business model, talent, and business processes.

POOL YOUR RESOURCES

Gather the talent, tools or other resources you need to do the work. Don't risk delays in your results by under-resourcing from the start.



STEP 5: MEASURE, ADJUST, CELEBRATE

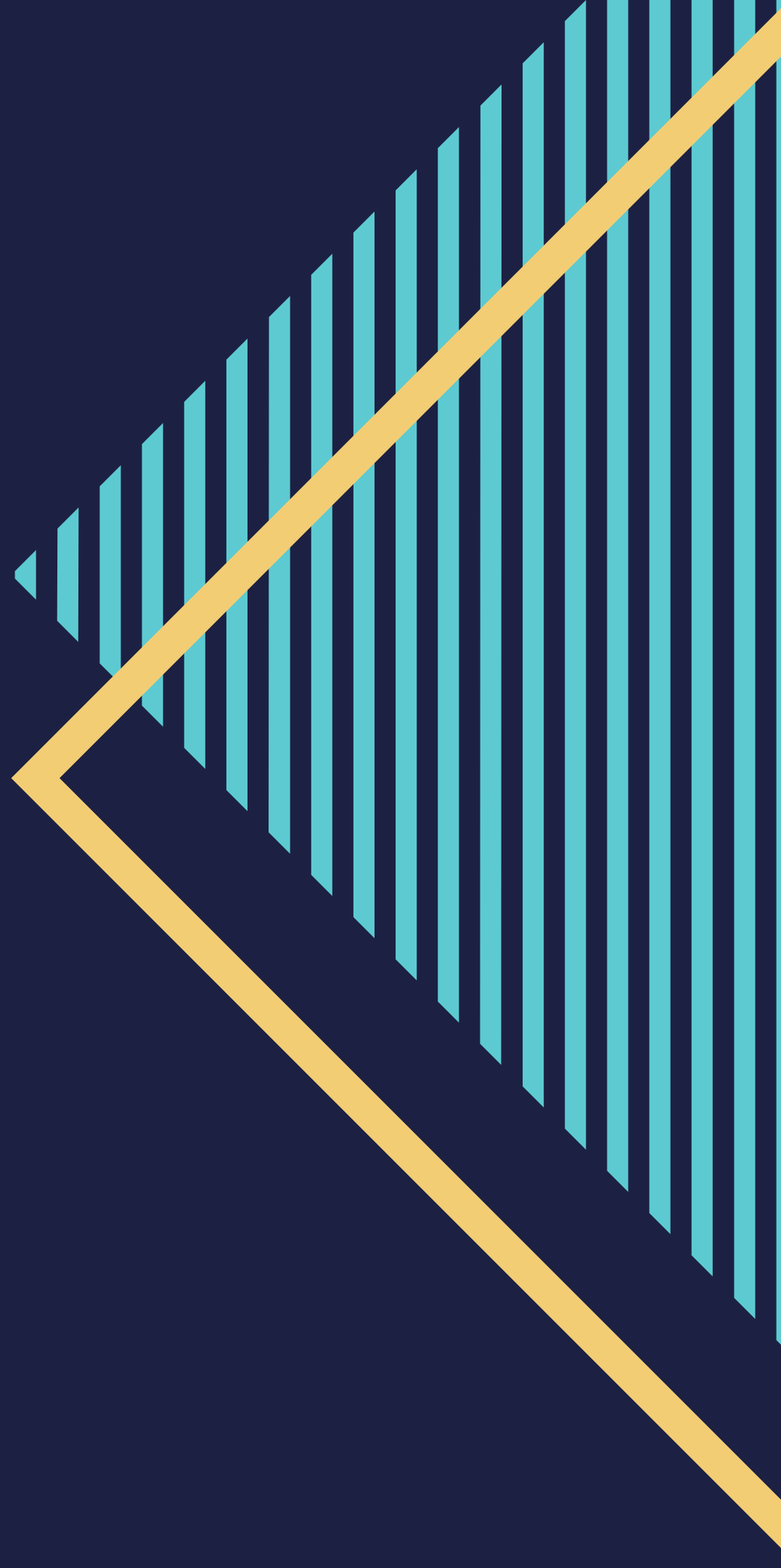
Remember those success measures you made in Step 3? Don't lose them!

Make yourself a dashboard and a plan to monitor the results. We recommend the cadence:

- Monthly: Are we doing what we said we would do?
- Quarterly: Are we getting the results we want?

Make adjustments when things aren't working out the way you planned and celebrate wins when they do.

Finally, don't keep these to yourself. Keep your fellow leaders, your team, and in some cases even your customers apprised of your progress. Celebrate your wins and acknowledge the work of your team. You'll need everyone's help to get there, keep them on board!



NEED MORE? WE'VE GOT YOU.

**WE HELP COMPANIES GET, KEEP,
AND GROW LARGER CUSTOMERS.**

LET'S TALK.

[Schedule a free 30 minute intro meeting](#)



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