

Survive Thrive Grow!

From Challenge to Opportunity

We know that you are facing unprecedented challenges. However, many companies are posting business level increases over the same period last year.

The businesses experiencing success are agile, constantly changing to meet current landscape challenges, and have a culture of learning, listening, and team recognition.

Typical Challenges

“We want to explore revenue opportunities in new areas without a full offering redesign”

“We are taking many actions, but the results are not materializing”

“Our sales and operations teams are always out of sync which results in great deal of inefficiency and cost”

“We do not seem to be effective in communicating the value of our solution to our customers and prospects”

Helping You to Succeed

We help solve complex business problems and address challenges to leverage untapped business potential and convert it into tangible business results.

We utilize LEAN techniques such as Kaizen events and evidence-based decision making in non-manufacturing settings to deliver tangible results, and clear metrics to provide transparent progress measurement to all stakeholders.

It is not just operational effectiveness that is important. We help sales and pre-sales organizations implement approaches such as selling value, value-based qualification, sales and operations planning, and CRM optimization with KPIs that produce consistency and team performance improvement.

*Leverage
Untapped
Potential!*



OAKMONTE ADVISORY

Please contact us at: (585) 369-9513
WWW.OAKMONTEADVISORY.COM



Opportunity Expansion Process Enhancement Improved Margins Sales and Operations Alignment Customer Success

A Competitive Advantage!

Companies cannot compete on product alone.

Aligning the organization with their understanding in how they contribute is crucial. Help your organization to understand where they can contribute and how. An aligned 'Everybody Sells' organization is a strong competitive advantage!

Fluid Execution

Alignment in messaging, sales, presales, services, and operations drives performance and profitability. We work with your team starting with the sales approach and messaging and ensure fluid alignment through the organization

Our Approach

Define and Improve

We work with you team to brainstorm, prioritize and align on target areas and the potential returns.

Our approach utilizes a DMAIC (**D**efine, **M**easure, **A**nalyze, **I**mprove and **C**ontrol) framework to ensure success and lasting improvement.

Once the definition and prioritization sessions are completed, we define the next steps and timeframe. Once the findings are distilled, we review the recommended approach with key stake holders for agreement to proceed.

Communication and Alignment

A communication plan for the full organization will be created to articulate the strategy, business objectives, and market opportunities defining the 'what', the 'why' and how.

Action Planning and Performance Management

We work with your team to create and execute a realistic implementation plan including key metrics and performance indicators will enable full transparency regarding progress post completion.

Engagement Profile

Engagements focus on technology, software, and manufacturing companies with annual revenues ranging from \$5M to \$80M. They are generally privately owned, or investor backed.

We are exceptionally skilled in turnaround situations, for an entire organization or a department team.

The executive expertise-as-a-service model provides experience, flexibility, and results. As part of the 'new normal,' this approach offers the ultimate in fulling the objectives and budget requirements.

Primary Advisory Areas

- Complex Problem Solving
- Process, Margin & Employee Experience Enhancement
- Sales & Ops Planning
- Sales Effectiveness
- Customer Experience and Retention
- Strategy and Opportunity Expansion



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