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# Ways to Drive Sales in a Services Business

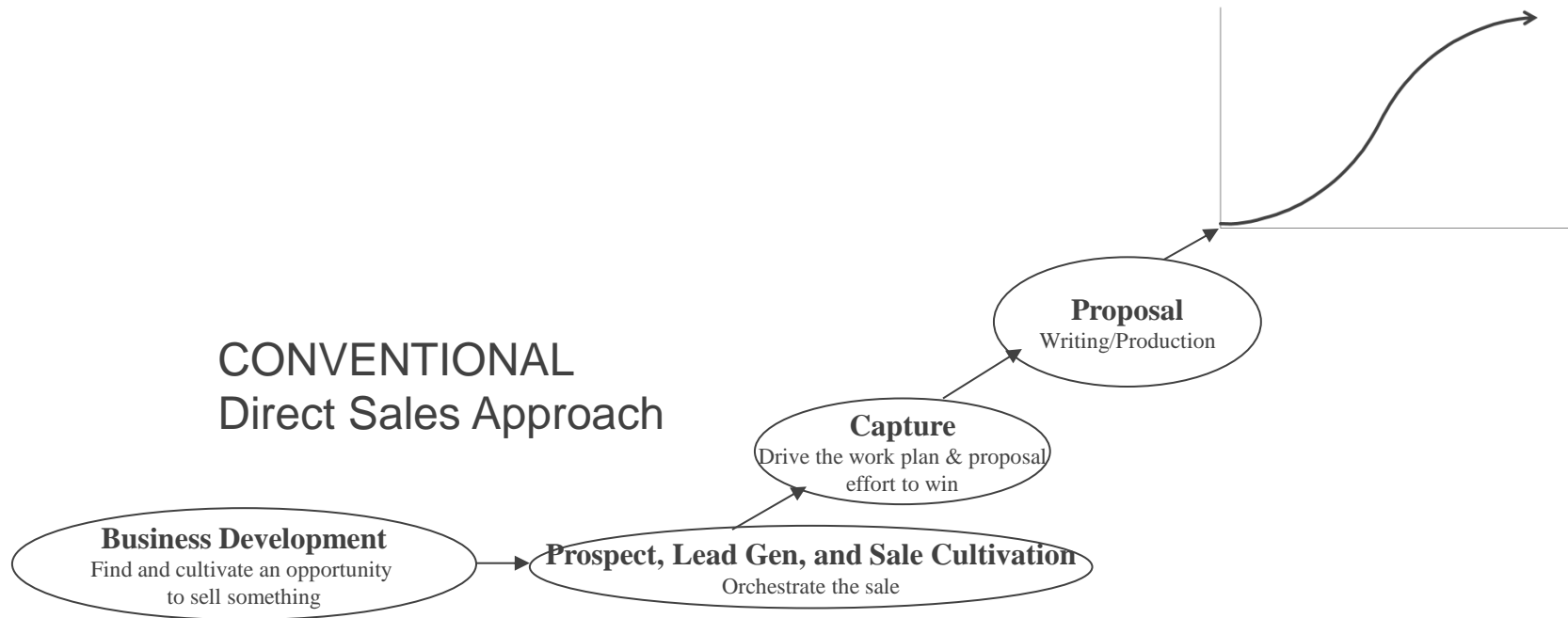
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IntelliVen

**Moderated by:** Raymond F. Strecker  
Promontory Financial Group

# Tasks Leading to a Sale

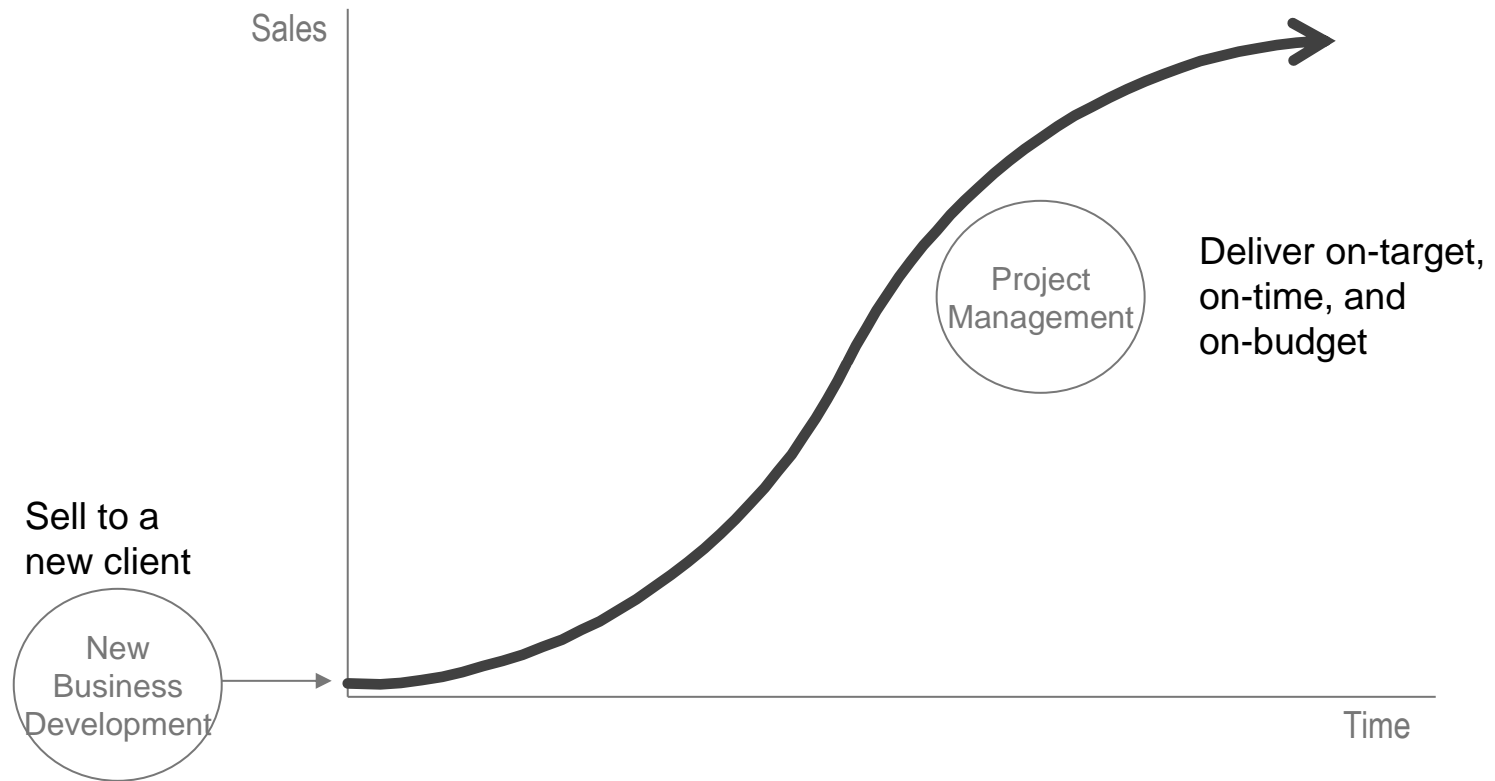
## Conventional Approach

CONVENTIONAL  
Direct Sales Approach



# A New Sale

Lands a project to deliver value.



# **Sales is too important to be left to chance. Do you have a sales model that answers questions like these?**

- How can delivery teams sell when they work flat-out on projects?
- How can non-experts in our products and services sell them?
- The next customer always seems to find us but can we count on this?
- Don't a lot of other organizations need the same thing we are delivering now? How do we reach them?
- Shouldn't we hire someone who knows everyone in the industry to find new customers?
- Shouldn't our engagement leaders do the selling?
- How do we come up with the next big thing?

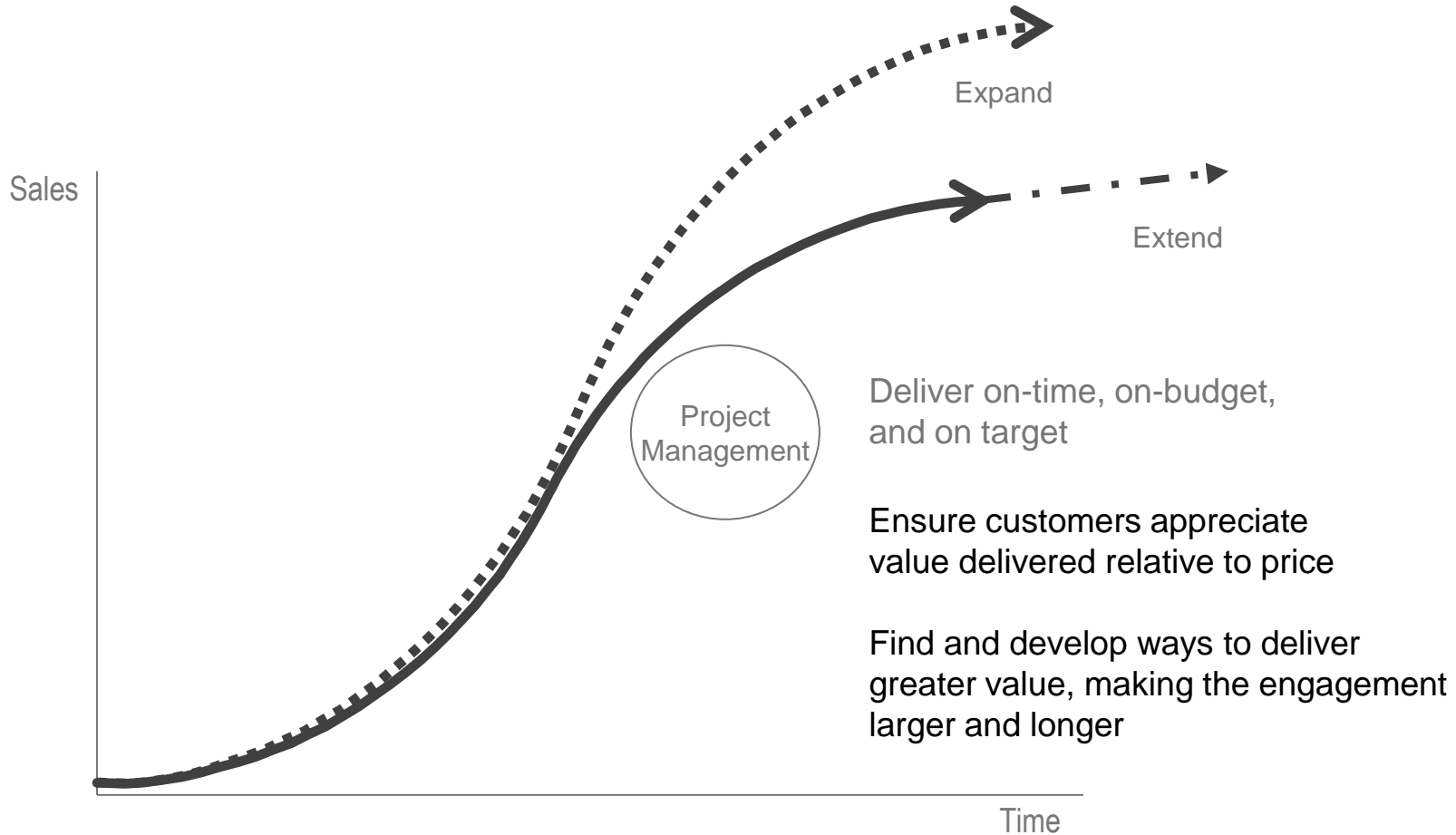
## Early-stage ventures often try to address sales by hiring those who have sold successfully for others.

“Pure Sales” Professionals	Seller/Doers
<ul style="list-style-type: none"><li>• Coin-operated – need clear incentives.</li><li>• Any list of contacts dries up over ~two years.</li><li>• Only some sales professionals are good at making new contacts.</li><li>• Success may be due to circumstances/luck.</li></ul>	<ul style="list-style-type: none"><li>• Ultra-strong personal relationships with senior people at a small number (as few as one) of large customers.</li><li>• Keep 35 to 50 people billable indefinitely.</li><li>• Groom and spawn next generation.</li><li>• Work independently; little shared knowledge or cross-player leverage.</li><li>• Organization can accommodate any number that achieve and sustain their revenue base.</li></ul>

- **Success takes more than great players.**
- **Hiring without a model can mean disappointing results.**

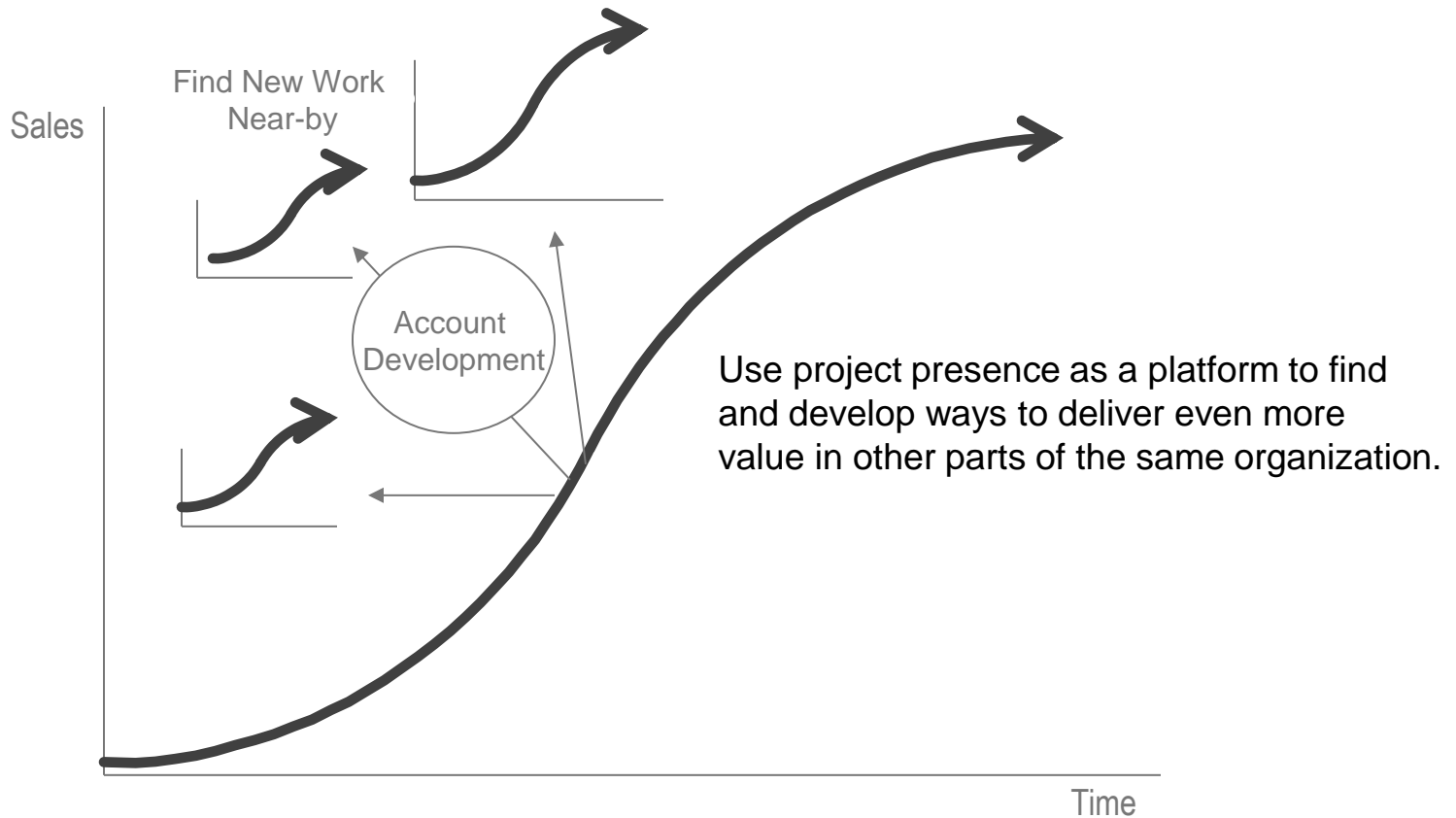
# Quality delivery leads to opportunities to

Extend and Expand to deliver even more value.



# Account Development

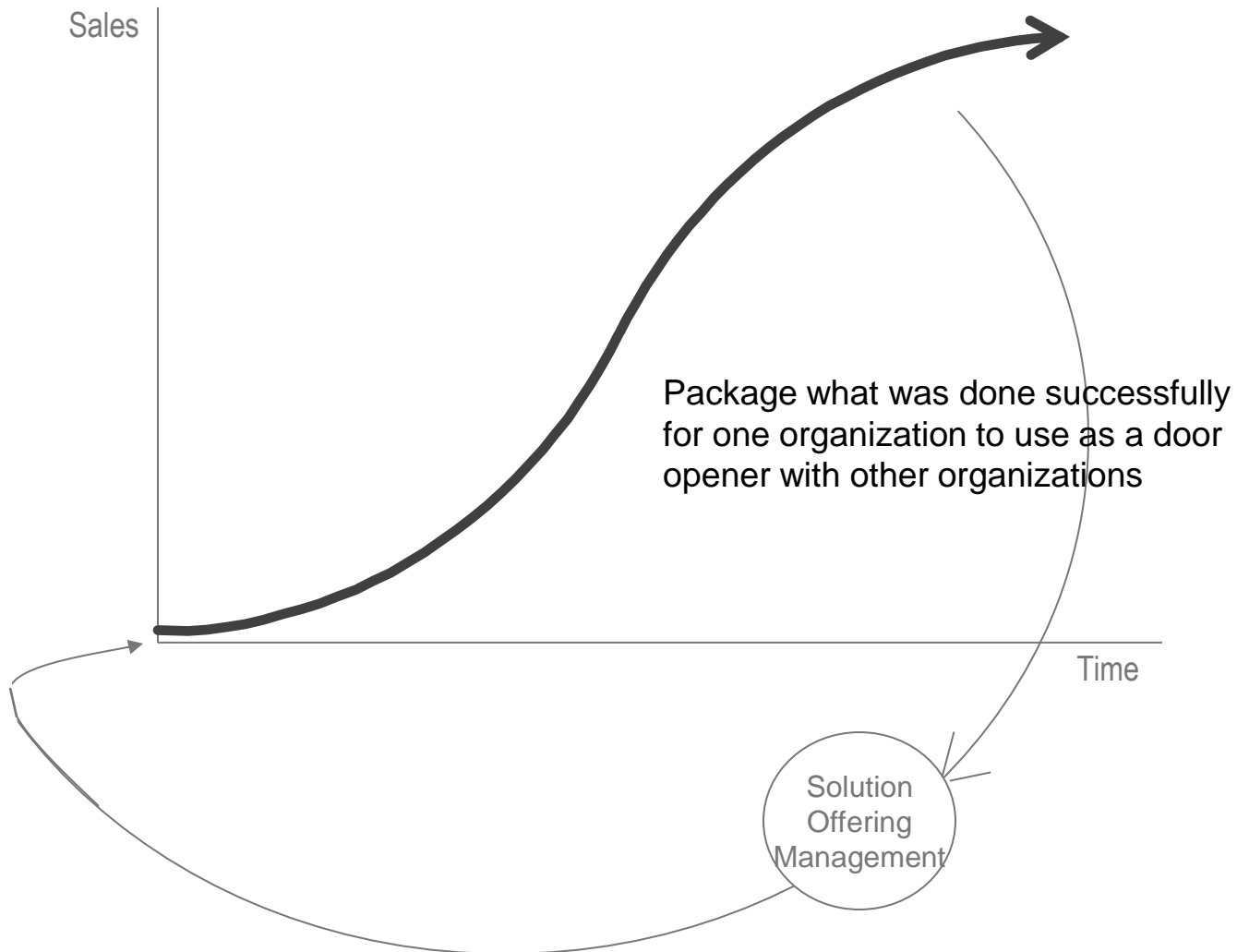
Project presence is a chance to navigate more broadly.





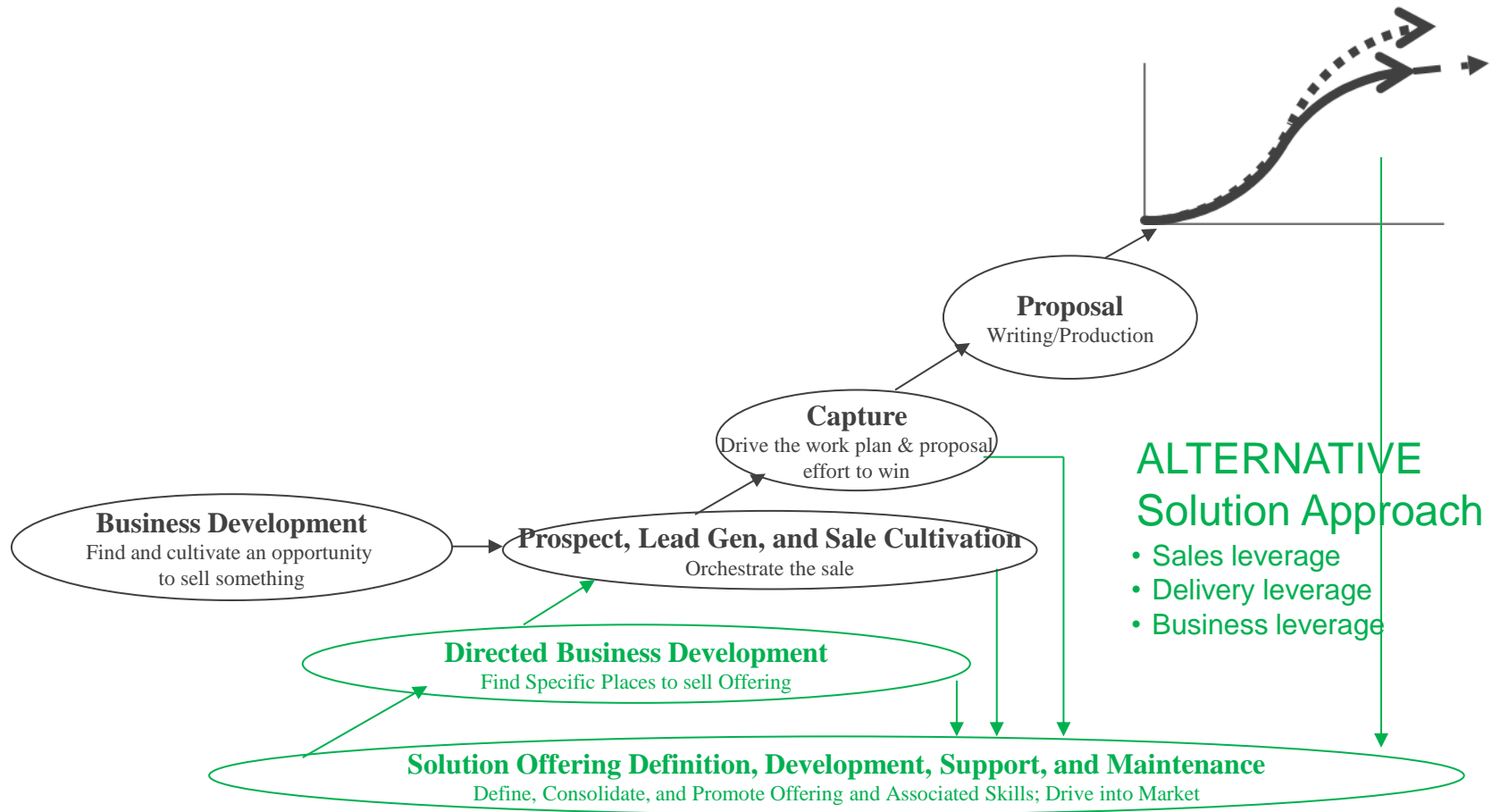
# Solution Offering

What works for one will work for others.



# Tasks Leading to a Sale

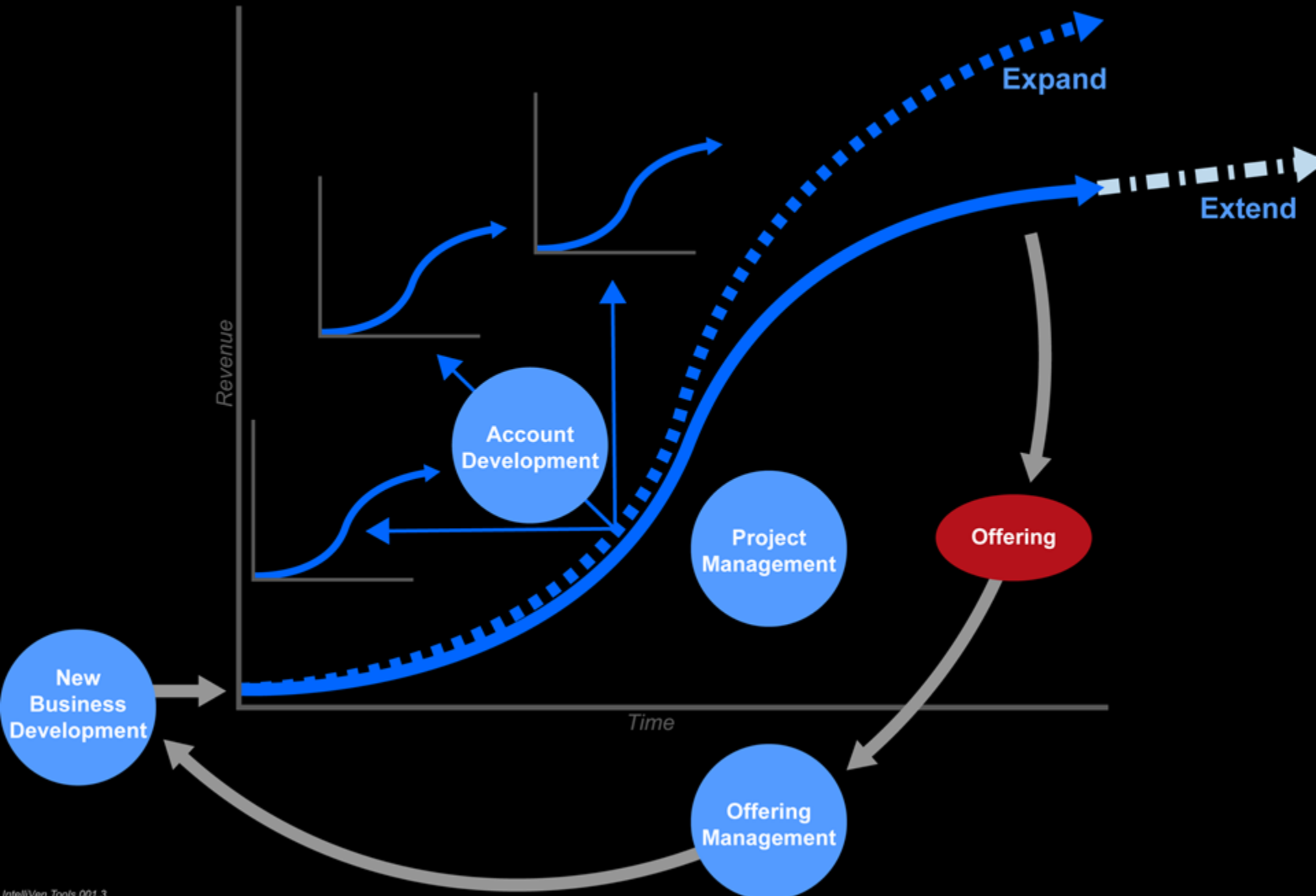
## Solution Offering Approach



# Solution Offering-Led Sales

- Systematically sell and deliver a solution to an *important, pervasive, persistent* problem.
- Critically dependent on assets (offering, methodology, data, knowledge).
- Can efficiently and rapidly grow.
- Requires **investment** to select and package offering(s).
- Can devolve to **In-Do-Out** vs. **In-Do-Extend/Expand/Find New Nearby**.
- Requires Unit Leaders to drive sales and delivery **and** develop people.
- Target only so many attractive niches that play to corporate strengths.
- Value delivered must drive **a price that gives a fair profit** after cost of development, support, and sales to a tight market.

# Summary of Ways to Drive Revenue in a Services Practice



# Distinct Sales Roles

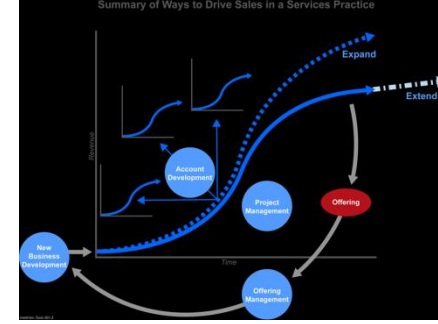
Breadth of skills required drives individuals to perform best in one of these specific roles.

Role	Description	Performance Metrics
New Account Salesperson	Finds and cultivates prospects through to closed sales.	New account sales relative to quota.
Sales Manager	Plans, tracks, drives, and sells through a team of salespeople.	New account sales relative to quota across a team of salespeople
Project Manager	Manages assigned resources to complete contracted work on time, on target, on budget.	Client reference; financial targets achieved; extend and expand engagement to deliver even more value to existing customer relative to a plan; growth of team members.
Account Manager	Finds and cultivates opportunities to deliver more value in other parts of client organization.	New work in other parts of organization currently being served.
Offering Manager	Collects, consolidates, and disseminates lessons learned; drives offering development in response to customer needs, competition, and technology.	Customer retention, growth in revenue connected to offering, and indirect expenses all in line with plan.
Unit Manager	Sets and achieves a plan to perform and grow revenue across clients in a market.	Contribution to corporate profit net of all direct and indirect costs including bonus awards.

# Implications of Sales Roles

- Each role requires specific skills, orientations, and focus.
- Roles can be assigned in ways that lead to poor results. E.g.:
  - No one has responsibility for selling more to existing customers in favor of focusing just on **delivery** and **finding new** customers
  - Delivery teams get assigned do it all.
- No one person can do a good job at all of the roles at the same time.
- Most people perform distinctly better at one role than the others.
- A good strategy is to decide who does what by matching needs with abilities and interests.
- All the roles are important and pay off if done well.

# Summary



- Assign qualified personnel to develop a plan and who then:
  - Deliver on target, on time, and on budget; ensure customers appreciate the value delivered; **Extend** and **Expand** current work (longer and more)
  - Find new opportunities to deliver value in other areas of the same customer
  - Package past success to pitch to new customer who will benefit from value provided to others
  
- Convene executive forums for leaders to conduct
  - Sales Reviews
  - Project Reviews
  - Customer Reviews
  - Solution Reviews
  - Unit Reviews
 cover: plan, actions, results, lessons, next steps, and what has to go right.

# Next Steps

- **Most important:** prepare for and conduct Account Reviews
- **Also a good idea to:**
  - Subscribe to intelliven.com
  - Sign up to attend upcoming IntelliVen Insight Sessions on Clewed:
    - Idea-to-Benefit
    - Approach for Developing Solution Offerings



# Selected References

- IntelliVen Post: [Sales – Whose Problem is it Any Way?](#)
- David Maister: [Managing the Professional Service Firm](#)
- Ford Harding: [Rainmaking: Attract New Clients No Matter What Your Field](#)
- Peter Block: [Flawless Consulting](#)
- Peter DiGiammarino: [Manage to Lead](#)

# Thank you.

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