

GLOBAL STANDARDIZATION OF SALES PROCESS AND METHODOLOGY

High-growth global software company with \$2B annual revenue

CLIENT'S SITUATION



- ☑ Very independent regional business units (Americas, Europe and Asia) have worked well to grow fast with an entrepreneur spirit and autonomy; however, the company has reached a size requiring global consistency and standards for sales process and methodology
- ☑ The client hired us to bring regional teams together to agree on a Sales Process for global adoption and a consistent deployment into their opportunity, pipeline and forecasting processes
- ☑ Project to lay out the foundation to migrate to Salesforce Lightning

THE SOLUTION



Sales Outcomes deployed a series of structured team conference calls over three months, where we shared market best practices and compared to their current definitions, aiming at finding common ground and acceptance of new standard processes. It included:

- ☑ Standardized sales process mapping and stage definitions
- ☑ Standardized on key sales pipeline metrics and review contents
- ☑ Standardized definitions and how to use the forecast category, next steps and probability fields
- ☑ Adapted MEDDIC sales methodology to their sales process
- ☑ Incorporate a "data-driven" forecast column into their management templates to enable future automation

OUTCOMES



- ☑ Globally accepted a new set of definitions for the sales process, pipeline and forecast management
- ☑ Managers started using immediately the new definitions in their internal review calls to ensure adoption at all levels
- ☑ Standardization was a key step for easier rollout of new Salesforce instance implementation