



## CASE STUDY

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# Global Provider of Engineered Solutions

## Sales Processes and Sales Roles Design

### Situation

- “Lead to Cash is the most important process change in the history of our company” – CEO and Executive Sponsor
- In the process of installing SalesLogix CRM & PeopleSoft (upgrades and new modules)
- Identified that resources have limited experience with mapping of sales processes and designing sales roles
- New customer segmentation structure and alignment with service levels evolving

### Challenges

- Need to design a high level sales process which will guide systems implementation
- Based on the high level sales process, existing and new roles need to be aligned with the high level sales process and performance measures

### Actions

- Conducted executive interviews which provided input to the Client Design Team
- Client Design Team developed process maps for the Lead to Order including Customer Service process
- In conjunction with the process maps and input provided by Senior Management, the Client Design Team created role profiles including metrics
- The Client Design Team addressed the risks of successful implementation
- Developed high level implementation plan

### Results

- Created new business processes and installed new software that empowered the sales team and perfected back end system (purchasing, order fulfillment, order processing, inventory etc) to support the new sales process, new roles and exceeded customers’ needs
- Increased Sales through better service and understanding of customers
- Increased Sales Productivity
- “Customer segmentation and service levels will improve customer retention.” – Design Team member