SALES STRATEGY AND EFFECTIVENESS:

SALES OPERATIONS COMPANION WORKBOOK

LESSON 01

Common methods to improve Sales Excellence

In working with your clients, can you think of any other methods to improve Sales Excellence? Discuss with a colleague to see if they have applied any of these methods in their work.

Tools and technology motion detectors

Can you think of any other indications that a sales technology or tool upgrade may be needed?

Deal Desk benefits

Have you worked on an engagement where a Deal Desk was implemented as part of the solution? How did it benefit the client? Or, if you did not, can you think of an existing or previous client that could have benefited with a Deal Desk as part of the solution?

Lesson summary

- Clients are increasingly using Sales Operations to evaluate account segmentation and coverage modeling to optimize where sales spends its time across products and business units.
- Leading Sales Operations organizations include a set of core capabilities that position sellers to spend more time with customers.

Build on your learning

How can you apply what you have found out in this lesson to future engagements?

LESSON 02

Framework overview

Can you think of an example of a sales motion stage, objective and exit gate as part of a sales process?

Framework deep dive

Consider a recent engagement relating to sales process – how would a CEM benefit your client? How would it benefit their customers?

Lesson summary

- Our clients are increasingly focused on embracing a customer-centric, end-to-end approach to sales process design.
- Our CEM framework is comprised of four foundational pillars, which consider the customer experience throughout the sales lifecycle.
- We leverage customer personas to map the customer journey and help us outline standard processes and assess areas for improvement for our clients.

Build on your learning

How can you apply what you have found out in this lesson to future engagements?

RESOURCES / FURTHER LEARNING

Sales Strategy and Effectiveness (method)

https://methods.ey.com/Production/sse/#process.adv.sse.base/deliveryprocesses/sse_C941F9F4.html

What banks can learn from tech companies on sales force transformation

https://www.ey.com/en_us/banking-capital-markets/what-banks-can-learn-from-tech-companies-on-sales-force-transformation

How to make your sales team relevant, resilient and revenue generating

https://www.ey.com/en_us/consulting/how-to-make-your-sales-team-relevant-resilient-and-revenue-generating