



Showcase on Sales Compensation



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STRATEGY



TRAINING



COMPENSATION

May 11, 2017



mark



michelle

- SalesGlobe Managing Partner
- Closet Art School MBA
- Sales Effectiveness Expert

- SalesGlobe Global Practice Leader
- Big Ideas in a Small Package
- Strategy and Change Management Expert

salesglobe

A Bit About Us



Advisory and Consulting Services

- Sales Strategy and Organization
- Account Strategy and Planning
- Incentive Compensation and Quotas



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schedule

Today's Schedule

9:30- Introduction- A Guide to the Objectives of Today's Event
Mark Donnolo and Michelle Seger- SalesGlobe

9:35- Sales Compensation Design- Challenges and Best Practices
Mark Donnolo and Michelle Seger- SalesGlobe

10:20- Sponsor Presentation- The Secret of Shifting Sales Culture to Drive Maximum ROI
Jon Clark- OpenSymmetry

11:00- Showcase- Refreshment with Exhibitors

12:05- Sponsor Presentation- Transforming Your Sales Force: How to Use Your Compensation Solution to Gain the Trust of Your End Users
Ross Elmsly-Beqom
Mathieu Nuee- Head of Variable Compensation, Pages Jaunes

12:35- Lunch

1:25- Topic Tables
Everyone

schedule

Today's Schedule (Cont'd)

2:10- Connected Planning for Sales: Deliver On-Time Sales Plans While Increasing Compensation, Quota, and Forecast Accuracy

Karen Clarke and Tom Edmunds- Anaplan

2:40- Showcase- Refreshment with Exhibitors

3:00- The Benefits of Automating Complex Compensation Processes

Matt Blanchard- IBM, Adam Baker- Close Brothers Asset Finance

3:30- Aligning The Team and Communicating the Plan

Mark Donnolo and Michelle Seger- SalesGlobe

4:30- Panel Session: Global Harmonisation

Mark Donnolo and Michelle Seger- SalesGlobe with

Jill Merken- Gemalto

Richard Higham- C3 Advisory

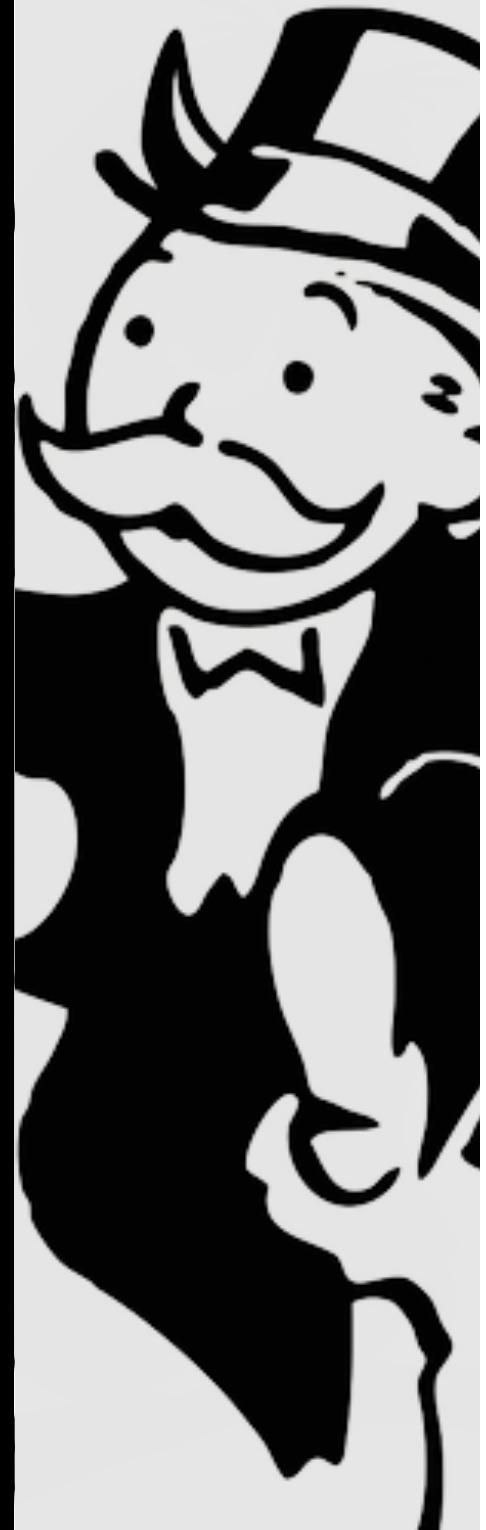
Rahim Rajan- Kantar Group

Kelsey Joyce- MATRIX Software

Pedro Jeronimo- Aricent

5:00- Close

Sales Compensation Design- Challenges and Best Practices



Top Challenges in Sales Compensation

issues

Some Top Sales Compensation Challenges

"You hit your quota and get rewarded with a bigger quota next year. It's not related to opportunity."

"Our highest earners aren't necessarily our highest performers. We can't attract and retain the right talent."

"Our plan promotes behaviors that are different than our strategy."

"The plan doesn't support solution selling. It drives an aggressive sales process and we need to be more consultative."

"Our reps aren't hitting their objectives in this economic environment. We need to keep them focused."

Setting Effective Quotas

52%

Differentiating Top Performers

42%

Supporting the Sales Strategy and Sales Roles

39%

Driving Solution Selling

36%

Keeping the Organization Engaged

29%

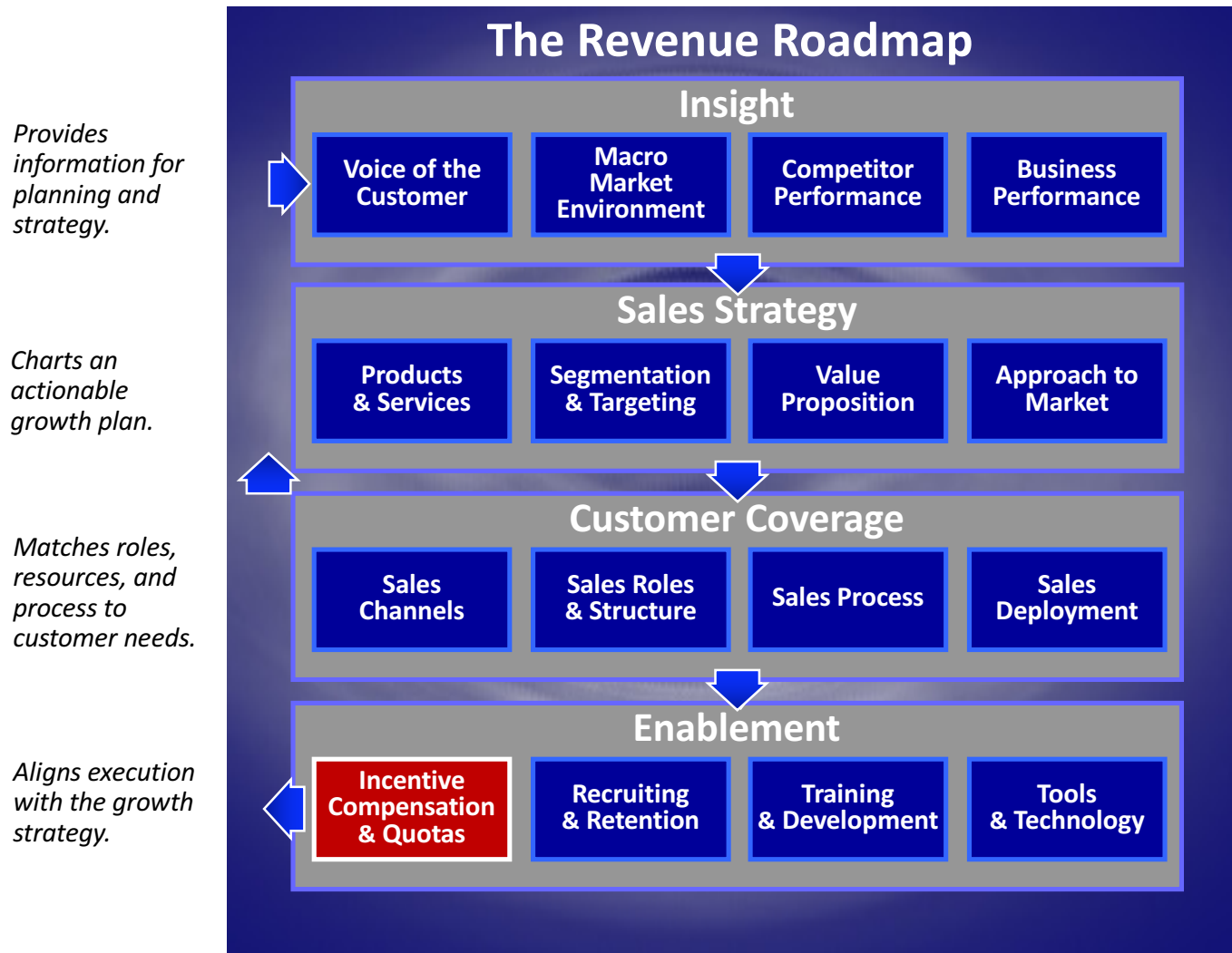
Plan Complexity

"I'm not clear on exactly how I'm paid. I just hope the check is right."

45%

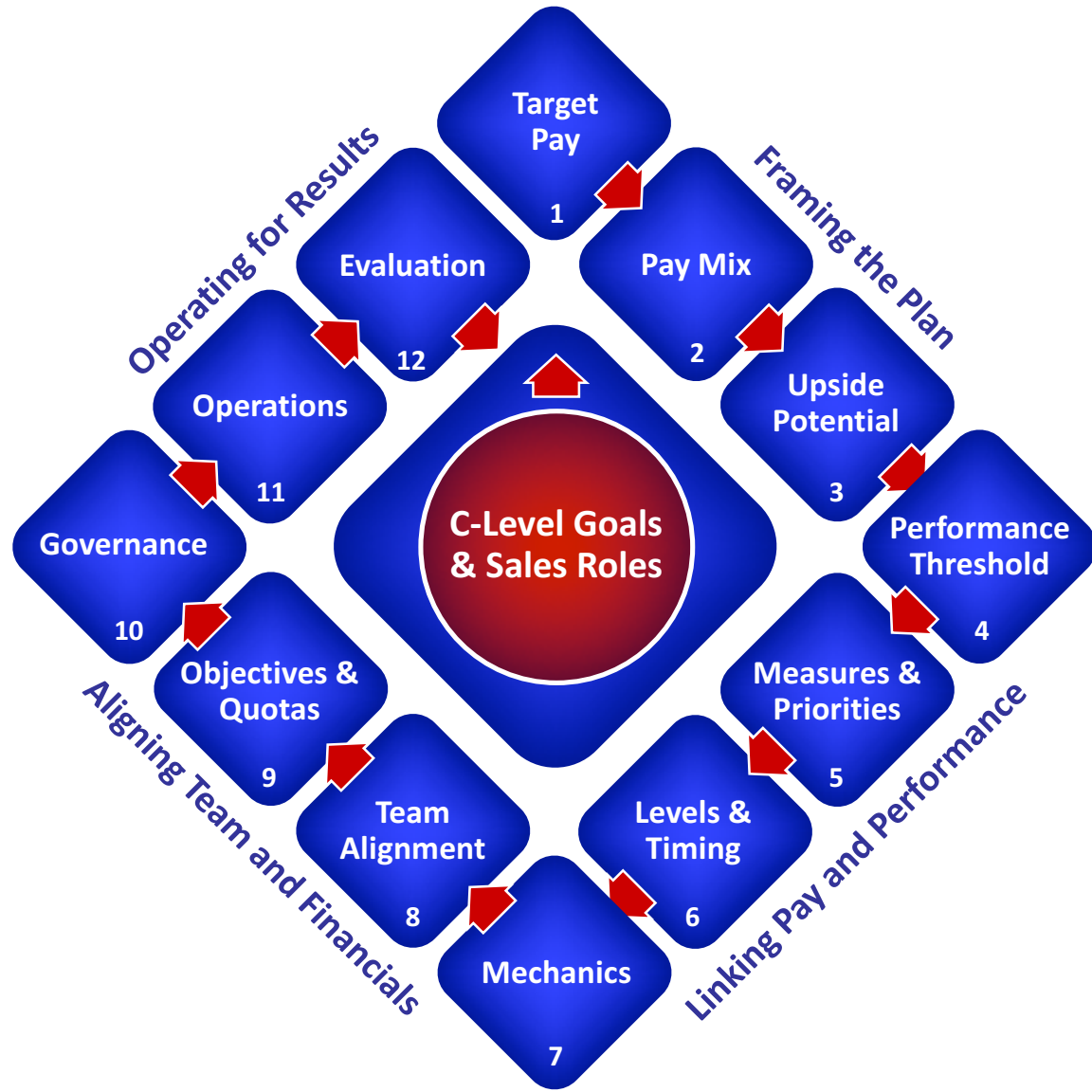
context

Strategic Context: The Revenue Roadmap



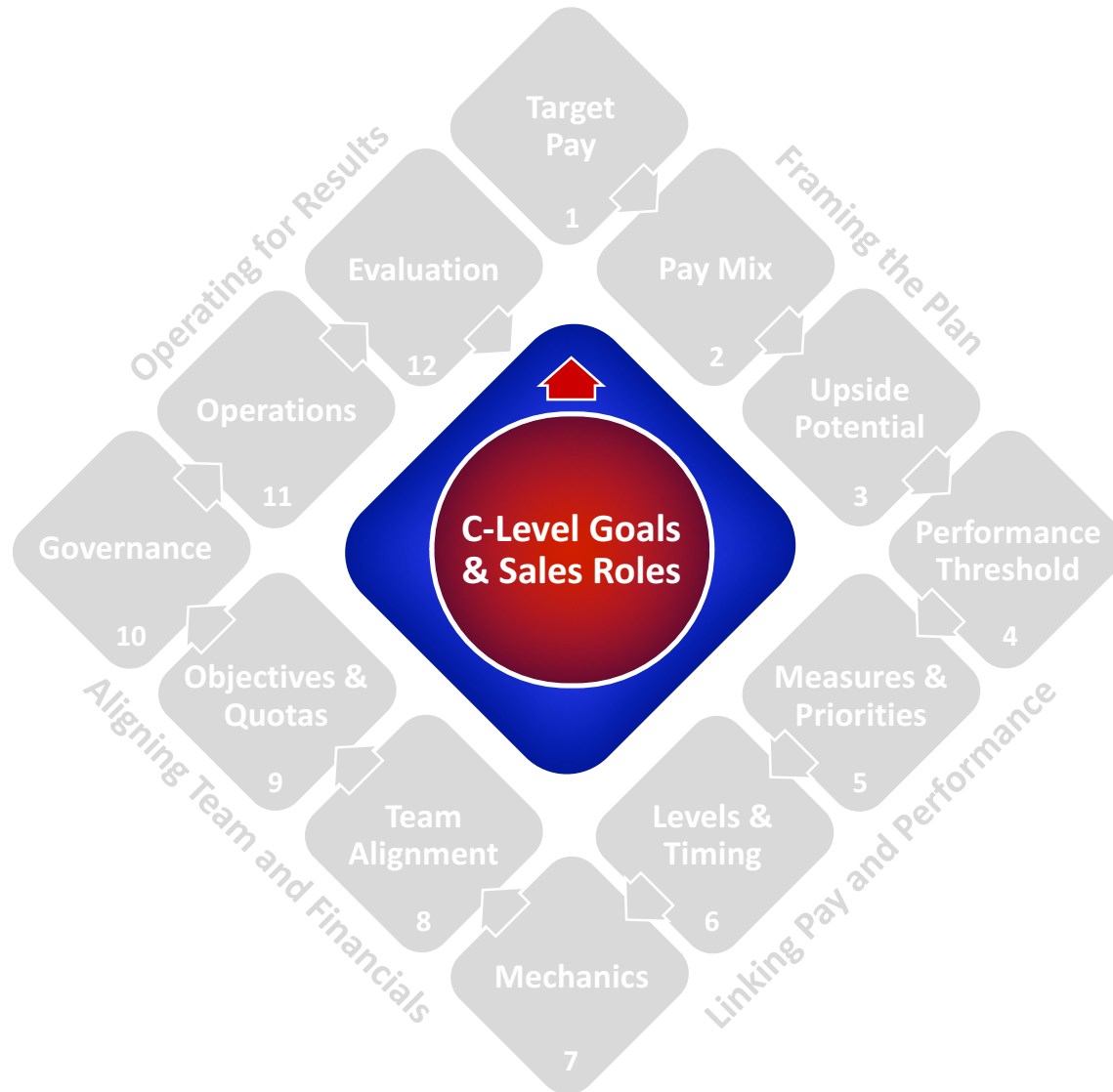
diamond

Sales Compensation Diamond



strategy

Goals and Roles



strategy

C-Level Goals

"We want to align our best sales resources with the right buyers further up in the organization."

"We want to execute our strategy of offering our full portfolio of solutions based on customer needs."



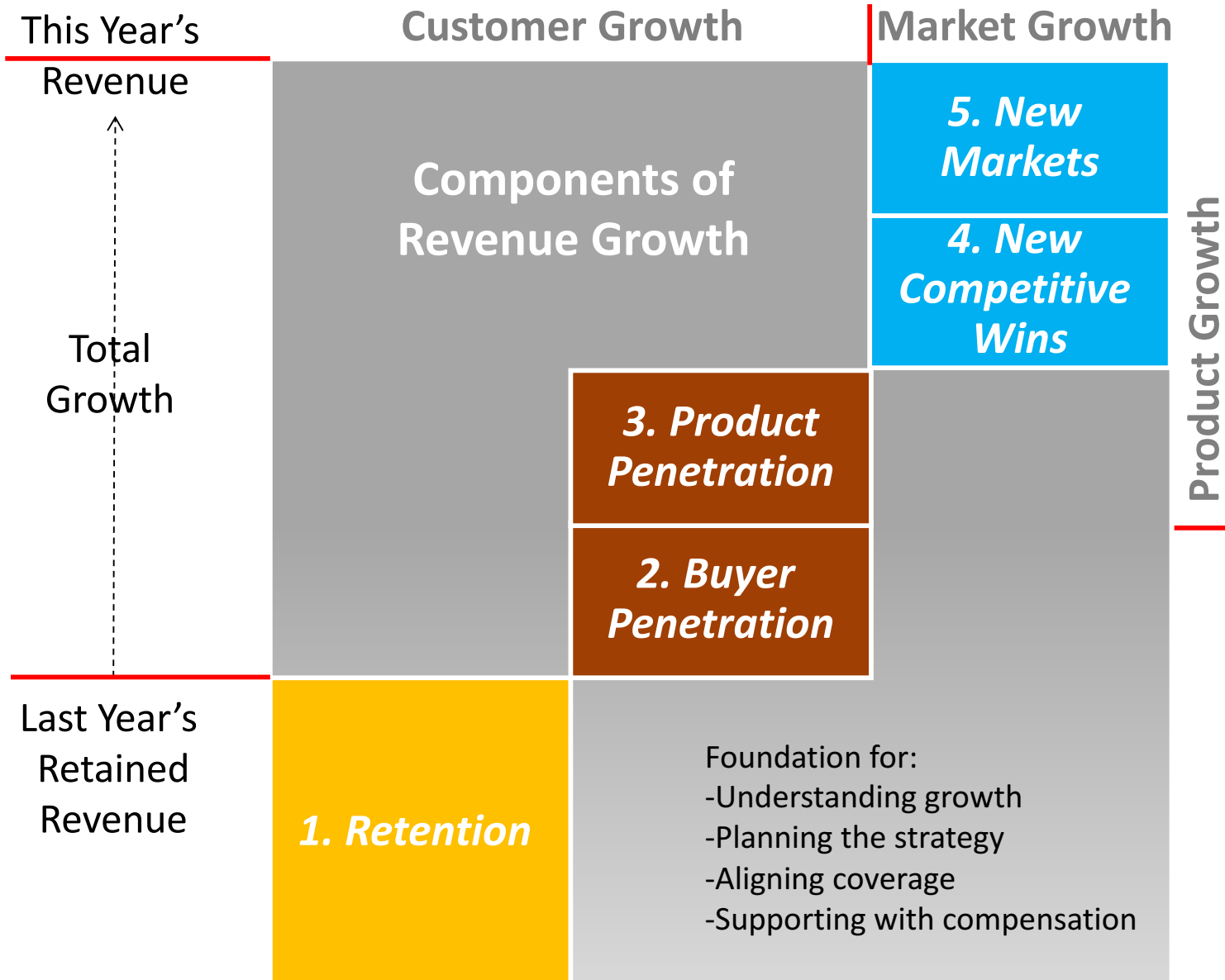
"We need to break the complacency in our sales culture."

"We need to build the sales organization of our future with one face to the customer."

"We want to drive twice as much sales productivity three years from now."

roles

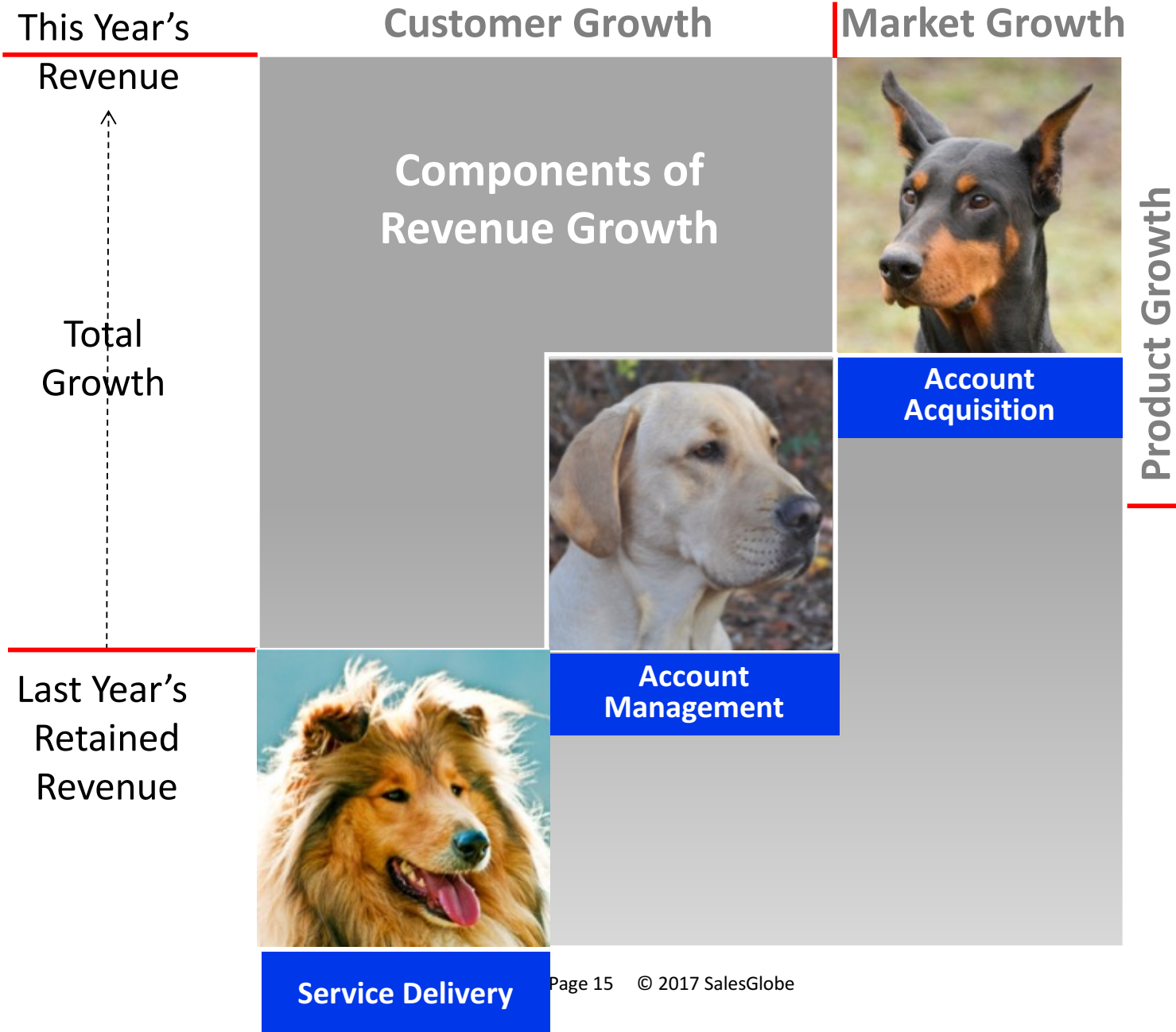
Aligning Roles to the Strategy



K9 > HF

roles

Motivating the Breed That You Need



roles

Motivating the Breed That You Need

This Year's
Revenue



Total
Growth

Last Year's
Retained
Revenue

Customer Growth

Market Growth

Components of
Revenue Growth



New Opportunity
Pointing

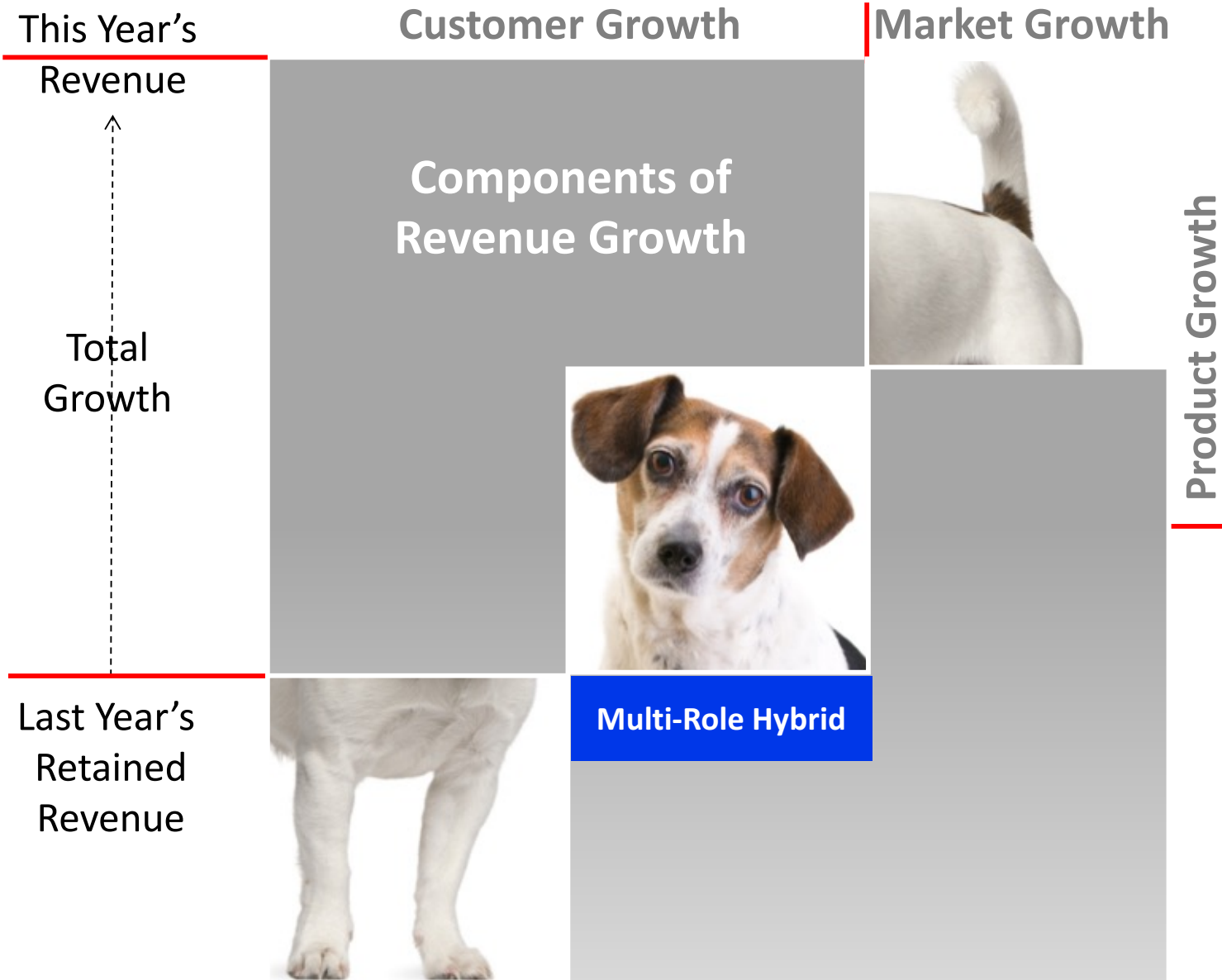


Specialization- Product or Market

Product Growth

roles

Motivating the Breed That You Need



Success Factors for C-Level Goals and Sales Roles

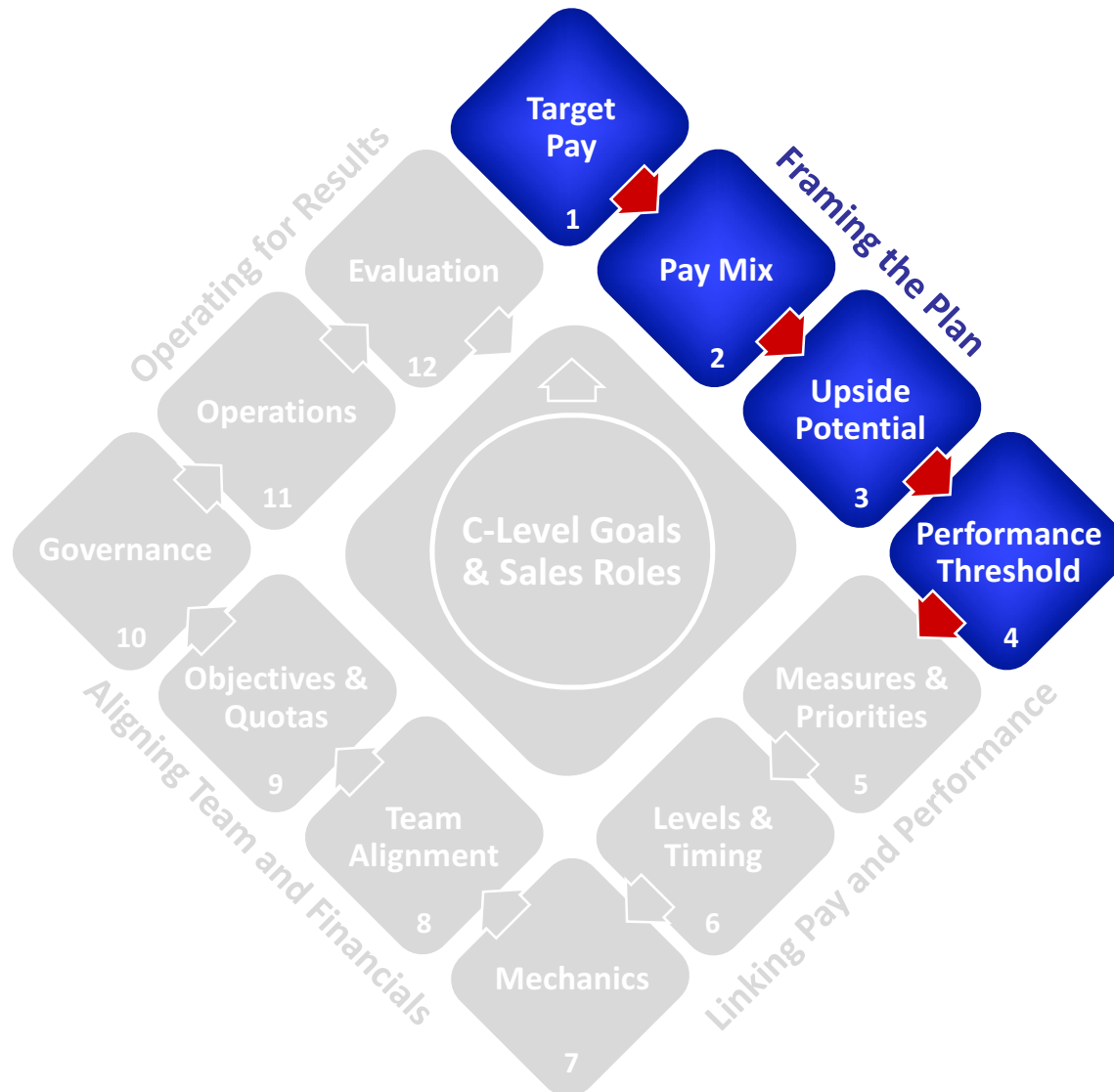
1. **Identify the C-level goals of the executive team and stakeholders.**
2. **Use C-Level Goals as a communications framework to confirm understanding and position your design proposals.**
3. **Build roles from the sales strategy.**
4. **Create focus and don't overload the bandwidth.**
5. **Get the right DNA for each role- don't force fit.**

Framing the Plan and Linking to Performance



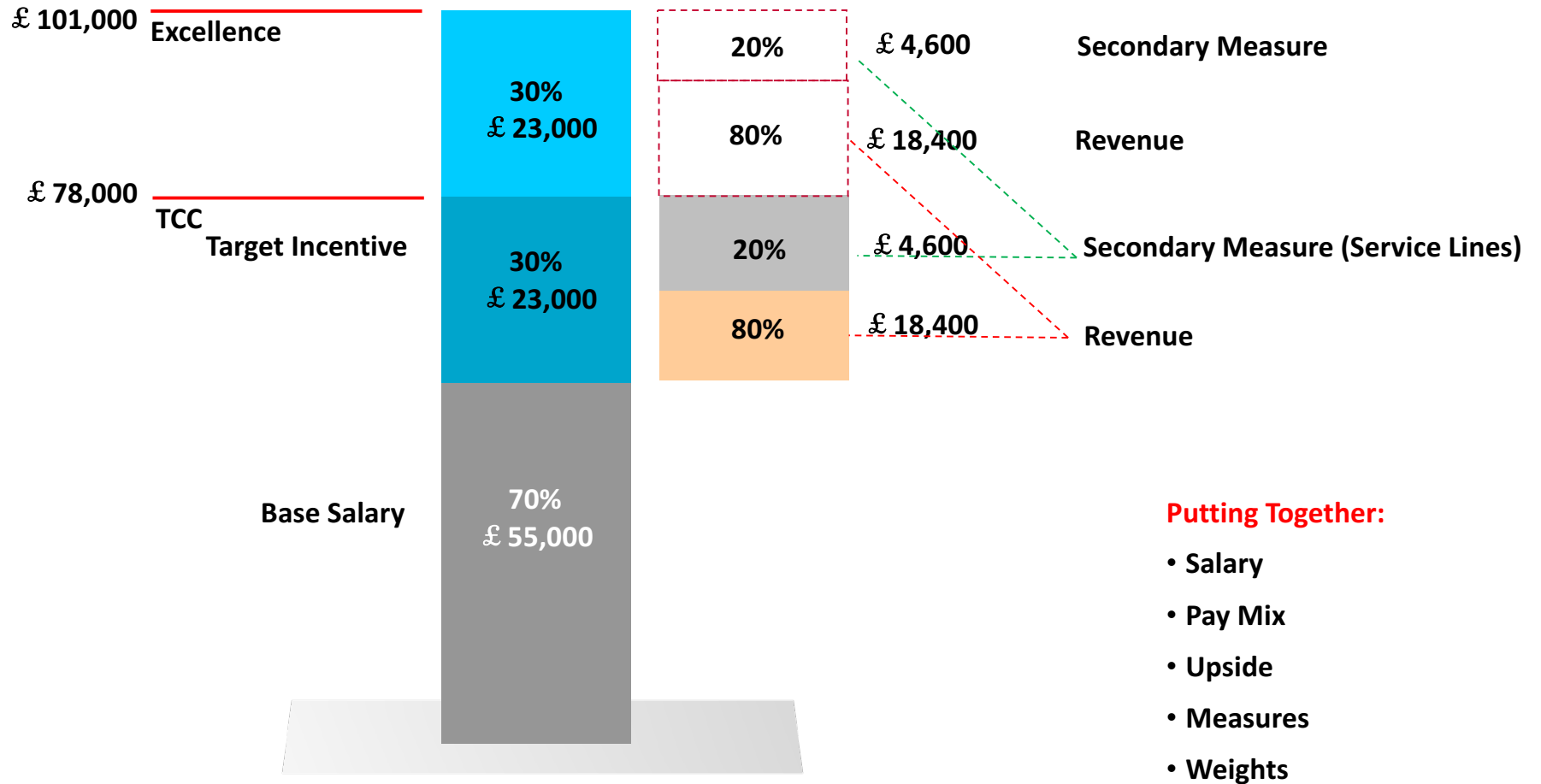
framing

Framing the Plan



whole

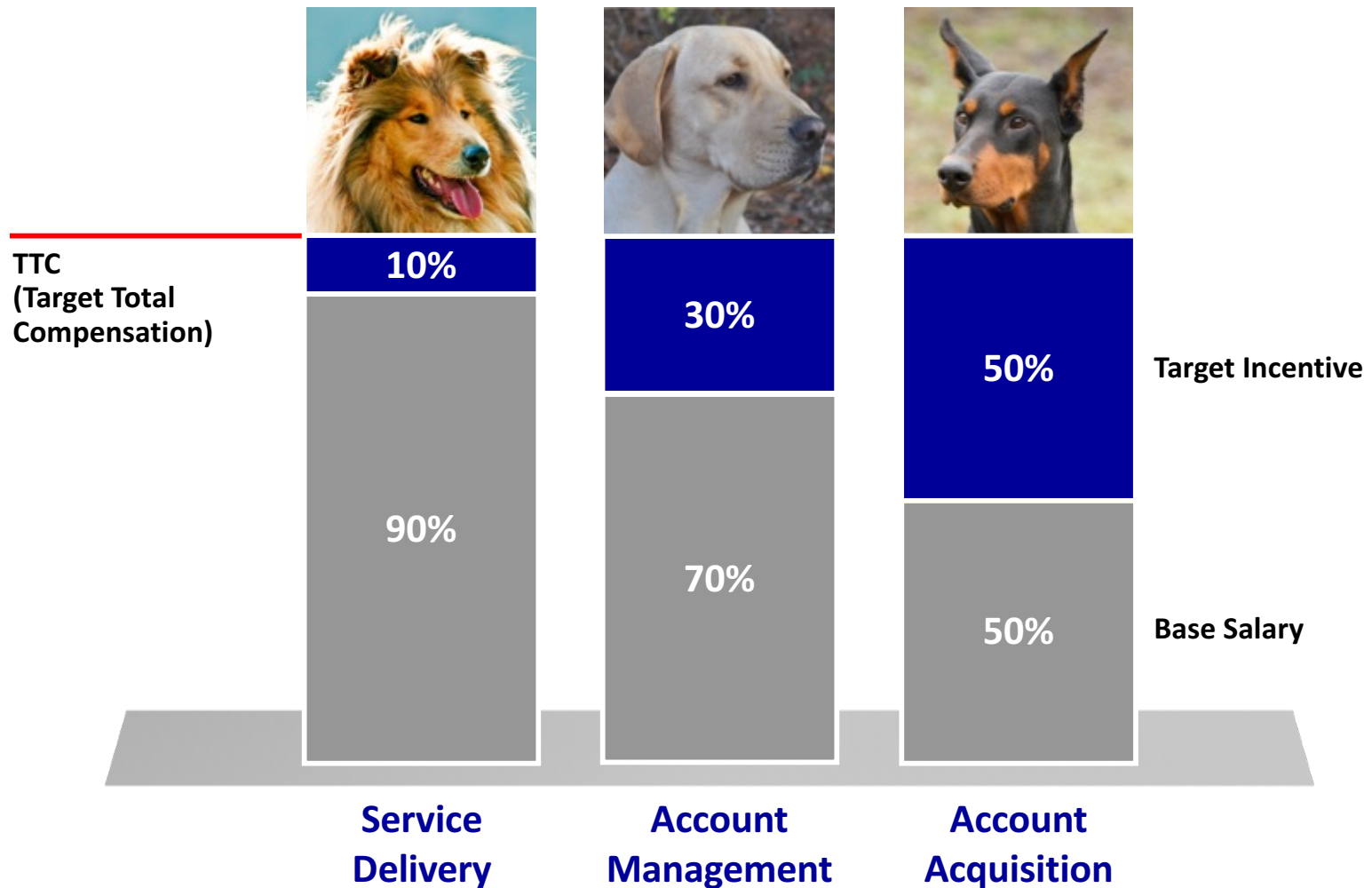
Putting the Pieces Together- An Example



Q: What's the Biggest Motivator in the Plan?

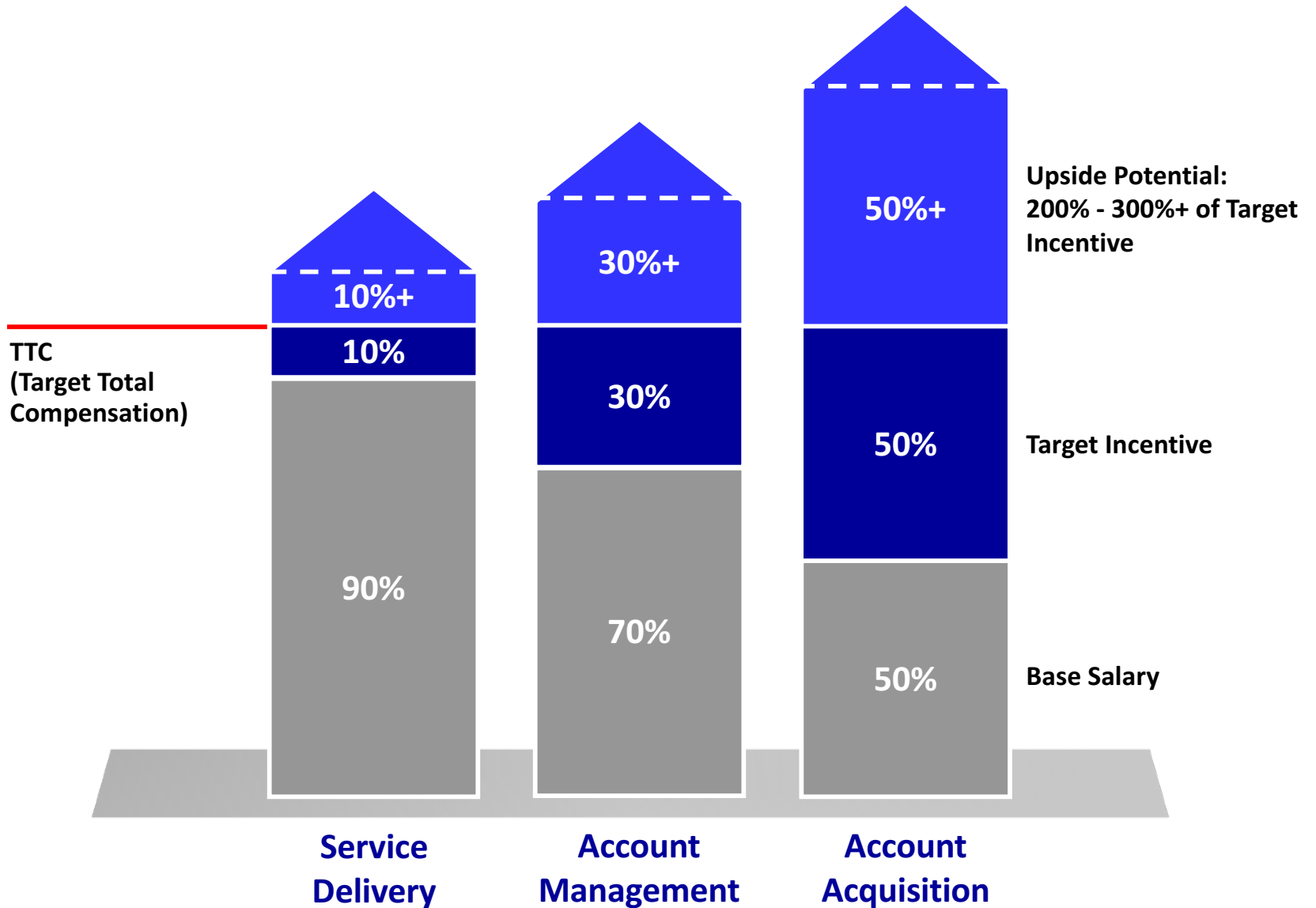
mix

Pay Mix



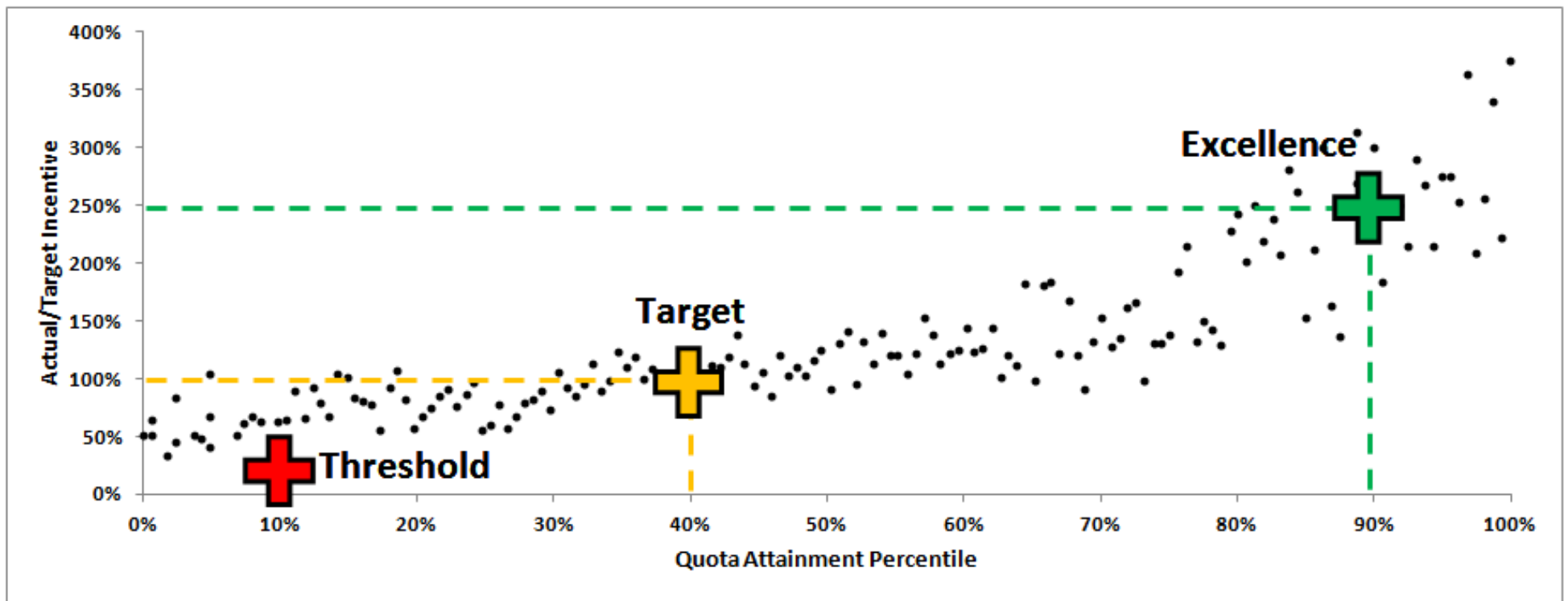
Upside

Pay Mix and Upside Potential



upside

The Reverse Robin Hood



threshold

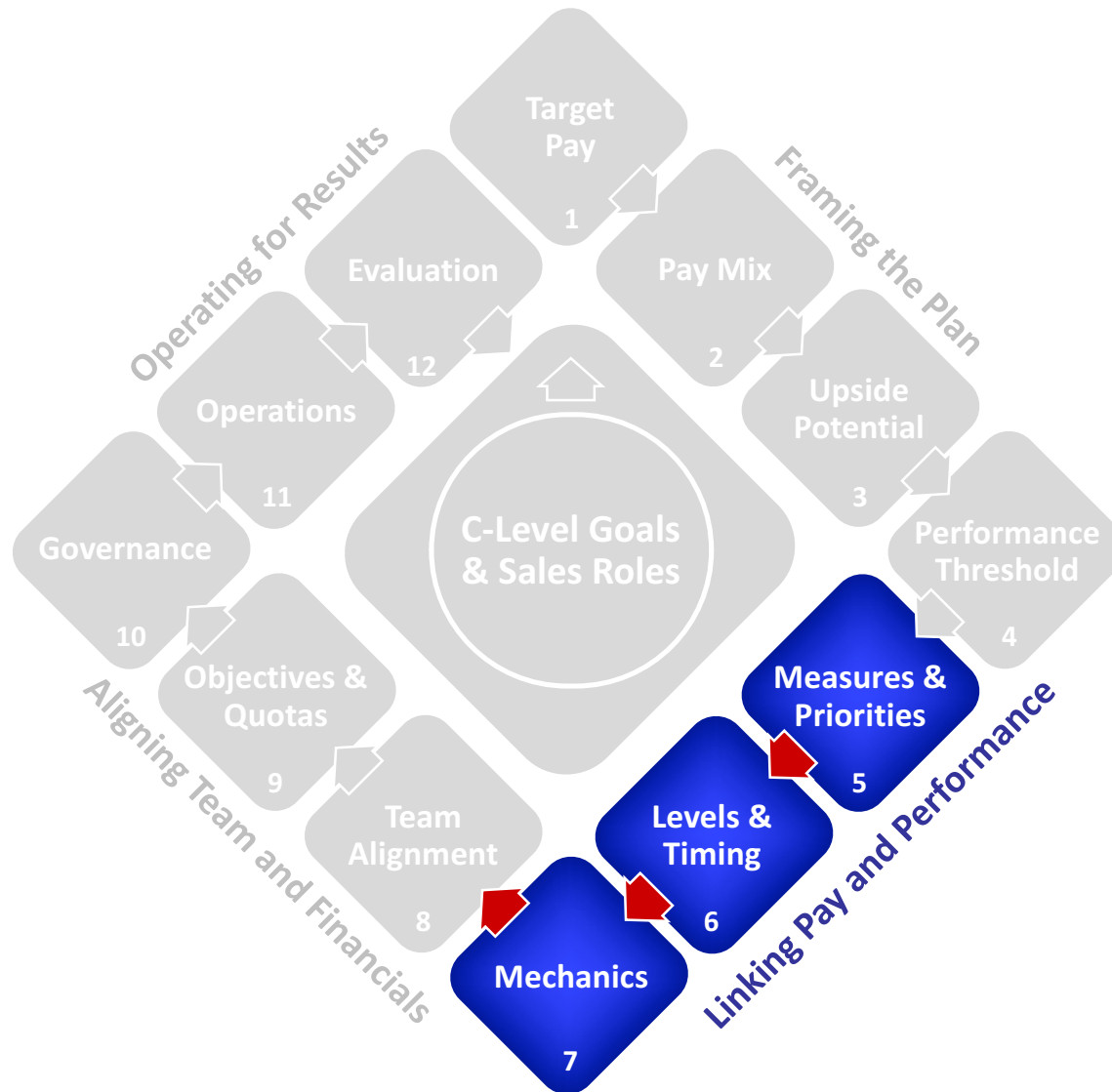
The Bus Protocol

Annuity	<i>Slow Ramp from First Dollar</i>	<i>High Threshold</i>
What is the Typical Type of Sale?	<i>Pay from First Dollar</i>	<i>Moderate Threshold</i>
Event	None	Full Quota
	What Portion of Quota Would Recur Without the Rep?	



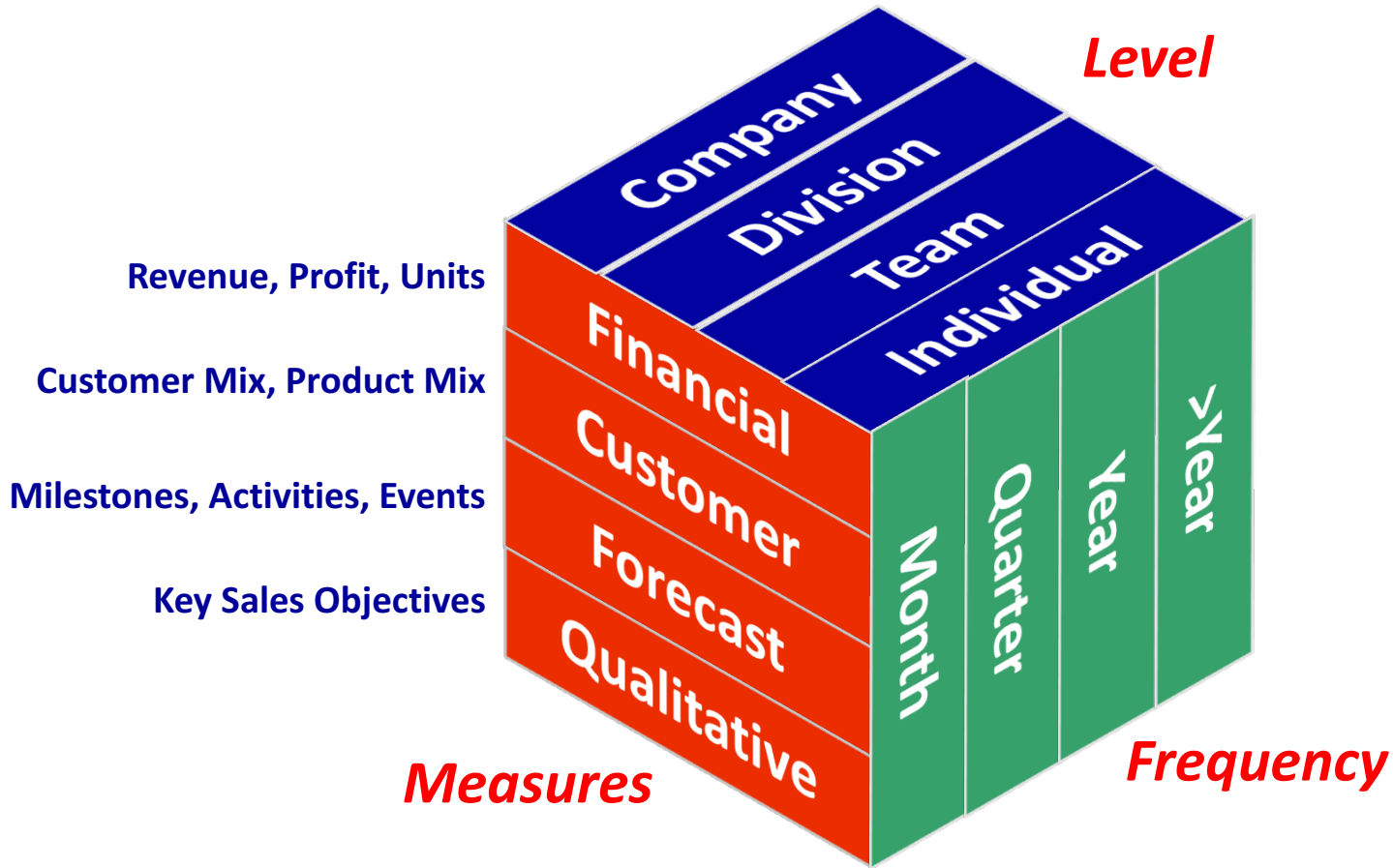
performance

Linking Pay and Performance



measures

Performance Measures Cubed



mechanics

Mechanics Types

Rate-Based

- Also known as a commission plan.
- A constant or changing rate of pay expressed as a percentage of financial performance or dollars per unit.
- Language clues: “for each”, “for every”, “per”, “of”.

For example:

2% of Revenue

Quota-Based

- Also known as a bonus plan or goal-based plan.
- A constant or changing rate of pay expressed as a percentage of target pay for a percentage of target performance.
- Language clues: “target incentive”, “quota”, “goals”.

For example:

**100% of
Target
Incentive**

commission

Rate-Based or Commission Plans

Uses

- Transactional sales environments
- Performance targets not clear, difficult to set or uneven across a single job role
- Early stage with “cost of sales” philosophy- risk and no managed pay levels
- All market opportunity balanced or no boundaries

Limitations

- Structured territories can become “hamstrung” by immovable commission rates—changing territories means cutting pay
- Must give new reps territories with adequate revenue run rates rather than developmental territories
- Reduces organization flexibility for new strategies—selling in both high-penetration and low penetration territories, selling new products or changing emphasis
- The commission rate becomes sacred and a false benchmark of value

commission

Flat Rate vs. Individual Commission Rate

Flat Commission Rate

Sum of All Rep Target Incentives	Sum of All Rep Territory Goals	Flat Commission Rate
\$1,000,000	\$27,000,000	4%

Uses

Territories or account assignments with relatively balanced sales potential and similar target incentives.

Individual Commission Rate

Rep A Target Incentive	Territory A Goal	Individual Commission Rate
\$15,000	\$430,000	3.5%

Uses

Territories or account assignments with varying sales potential (within a range) and similar target incentives.

Rep B Target Incentive	Territory B Revenue Goal	Individual Commission Rate
\$15,000	\$330,000	4.5%

commission

Stepped Commission Rate

Stepped Rate- Linked to Quota

Performance to Goal (Cumulative YTD)	Commission (Retroactive)
120%+	7%
100%-119%	5%
50% to 99%	3%
<50%	-

Uses

Differentiating rates for different performance levels.

Emphasizing quota attainment.

Simple calculation on all prior dollars rather than discrete buckets.

commission

Balancing Rates According to Importance and Difficulty

		Relative Commission Rate		
		Easy	Average	Difficult
Strategic Importance	Strategically Important	1.5 x	2 x	3 x
	Average	0.75 x	1 x	1.5 x
	Strategically Unimportant	0.25 x	0.5 x	0.75 x

Sales Difficulty for Rep

Quota-Based or Goal-Based Plans

Uses

- Mature selling environments—multiple job types and strategies
- Known opportunity for reliable goals
- Varied territory types—potential and strategy vary by assignment
- Sophisticated or varied sales strategies—multiple products or opportunities
- Effective for “financially shaping” the compensation plan around financial requirements

Limitations

- Hard to move to when commissions have become sacred
- Perceived to pay less than commissions although they can pay more
- Difficult to use in areas with unknown potential
- Rely on fair quota-setting

Quota-Based Mechanic

Measure: Total Revenue	
Performance to Goal (All Revenue Dollars)	Percent of Target Incentive Paid
140% (Excellence)	200%
120%	150%
100% (Target)	100%
80%	60%
60%	30%
40%	10%
<40%	0%

Actual performance and payout are calculated on 1% increments using a detailed payout table provided in the plan documents.

Uses

Links to quota attainment.

Simple calculation on one attainment number.

Linking Measures: Quota with Gate for Service Lines

Measure: Revenue and Service Line Performance			
Performance to Goal	Percent of Target Incentive Paid (No Service Line Quotas Attained)	Percent of Target Incentive Paid (One Service Line Quota Attained)	Percent of Target Incentive Paid (Two Service Line Quotas Attained)
140% (Excellence)	150%	200%	250%
120%	125%	150%	175%
100% (Target)	100%	100%	100%
80%	60%	60%	60%
60%	30%	30%	30%
40%	10%	10%	10%
<40%	0%	0%	0%

Uses

Connecting a second important measure (product mix) with the primary measure.

Actual performance and payout are calculated on 1% increments using a detailed payout table provided in the plan documents.

quota-based

Linking Measures: Quota with Multiplier

Measure: Booked Revenue (100%)	
Performance to Quota	Percent of Target Incentive Paid
150% (Excellence)	150%
140%	140%
130%	130%
120%	120%
110%	110%
100% (Target)	100%
90%	80%
80%	60%
70%	40%
60%	20%
50%	1%
<50%	0%

Actual performance and payout are calculated on 1% increments using a detailed payout table.

Above Excellence, plan continues to pay at same slope of 1% of Target Incentive for each 1% of quota attainment.

Number of Service Line Goals Attained	Multiplier on Revenue Payout
4	1.3
3	1.2
2	1.1
<2	1

Revenue payout is multiplied by the multiplier above for total payout.

Uses

Connecting a second important measure (product mix) with the primary measure.

quota-based

Linking Measures: Multiplier Variations

Multiplier for New Customers Signed

Measure: Major New Customers	
New Customers Acquired During 6 Months	Multiplier on Growth Commission Payout
5	1.5
4	1.4
3	1.3
2	1.2
1	1.1

Multiplier for Cross-Sell

Measure: Penetration Cross Sell	
Performance	Multiplier on Total Commission Payout if Revenue Goal Attained
Both Product A and Product B Goal Attained	1.6
Either Product A or Product B Goal Attained	1.3
No Product Goals Attained	-

Multiplier for Contract Term

Measure: Average Contract Term	
Performance	Multiplier on New Revenue Payout
>24 mos. (Excellence)	1.3
18-24 mos.	1.2
12-18 mos. (Target)	1.1
<12 mos.	1

Multiplier for Manager's Reps Attaining Goal

Measure: Reps to Quota	
Percentage of Reps Who Attain Quota	Percent of Target Incentive
100% (Excellence)	120%
90% - 99.9%	110%
70%-89.9%	105%
60% - 69.9% (Goal)	100%
<60%	80%

quota-based

Linking Measures: Matrix

Revenue and Profit (Percent of Target Incentive)

Profit Dollars to Quota	140%	150%	188%	225%	263%	300%
	120%	113%	142%	171%	200%	263%
	100%	75%	88%	100%	171%	225%
	80%	38%	50%	88%	142%	188%
	40%	1%	38%	75%	113%	150%
		40%	80%	100%	120%	140%
		Revenue Dollars to Quota				

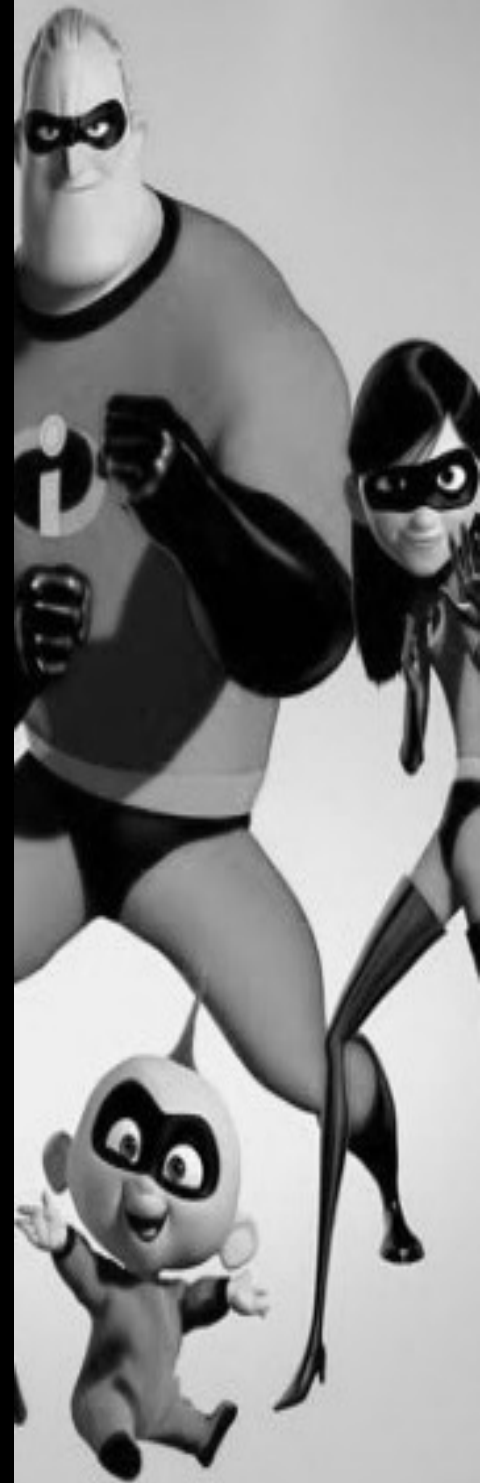
Uses

Connecting Opposing Measures That Must Both Be Achieved.

Success Factors for Framing, Measures and Mechanics

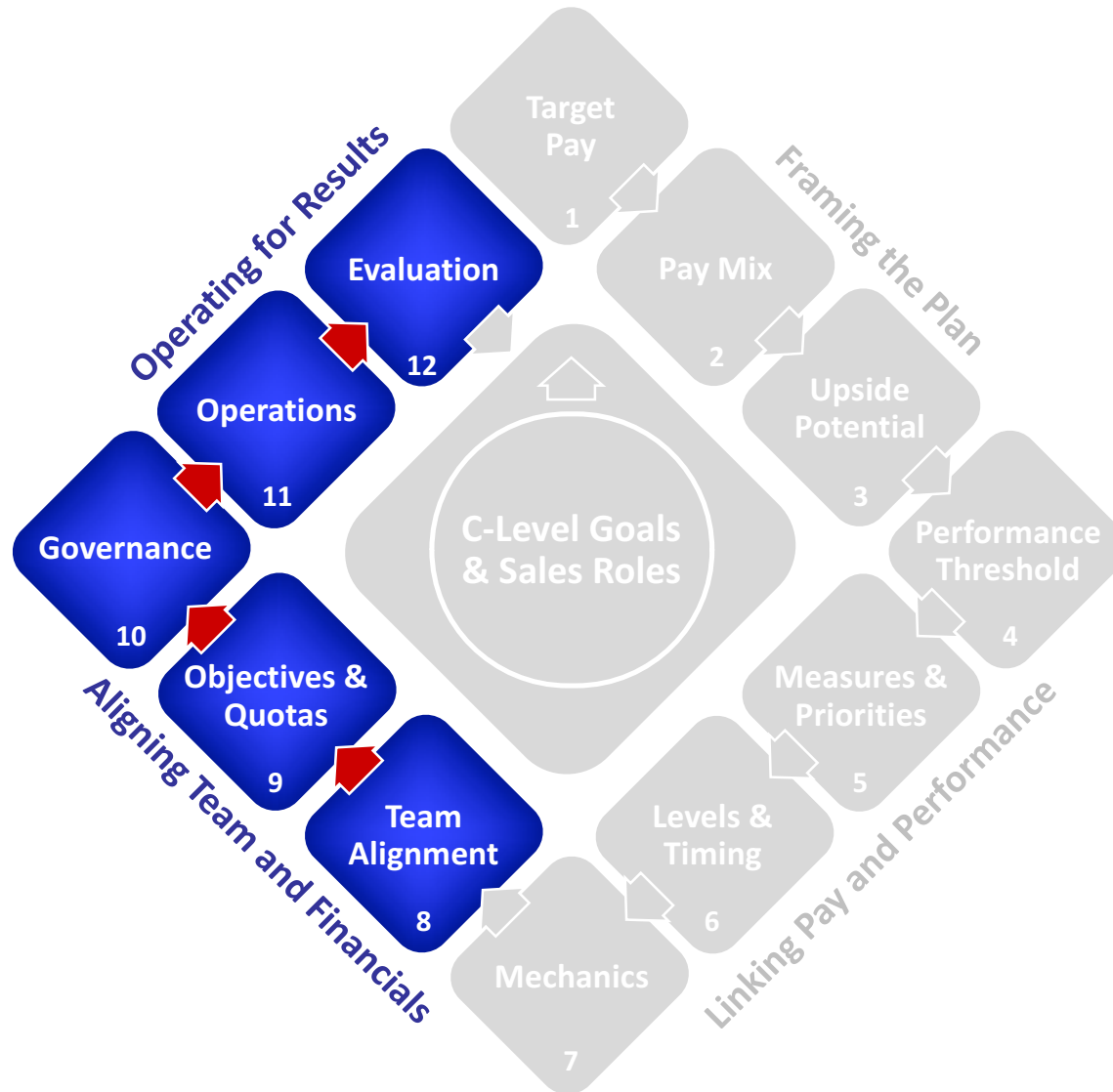
- 1. Match pay mix to the sales role.**
- 2. Differentiate the top performers with the Reverse Robin Hood.**
- 3. Use three or fewer measures with no less than 20% on each.**
- 4. Measure and pay as close to the event as possible.**
- 5. Use the lowest team level, if not individual.**
- 6. Measure only what is transparent, understood, and trusted.**
- 7. Keep mechanics simple.**

Aligning the Team and Communicating the Plan



align

Aligning the Team and Communicating the Plan



Communicating the Plan



why

What's Your Change Story?

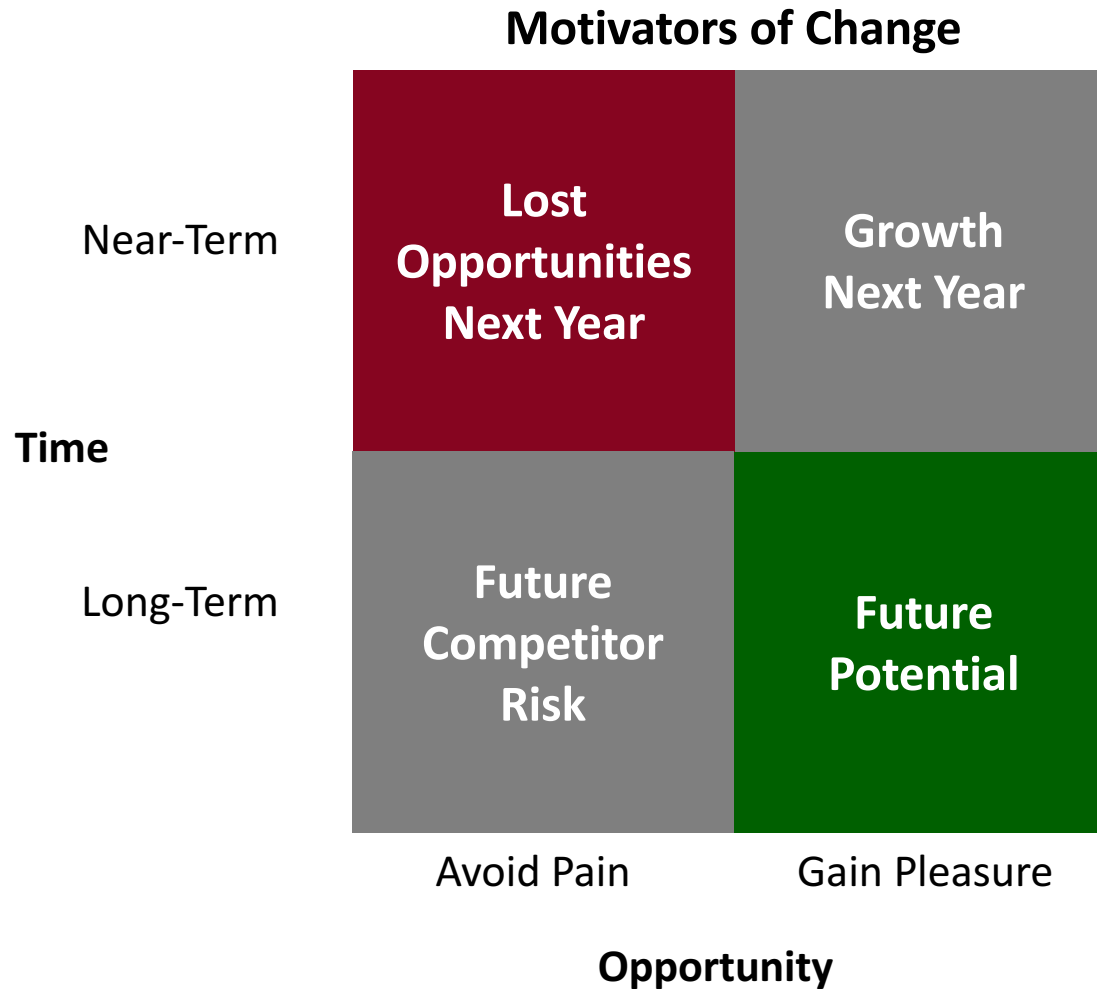
Why are we changing the sales comp plan?

- A future opportunity for growth?
- Align with a new coverage model?
- Support our strategic goals?
- Stem turnover?



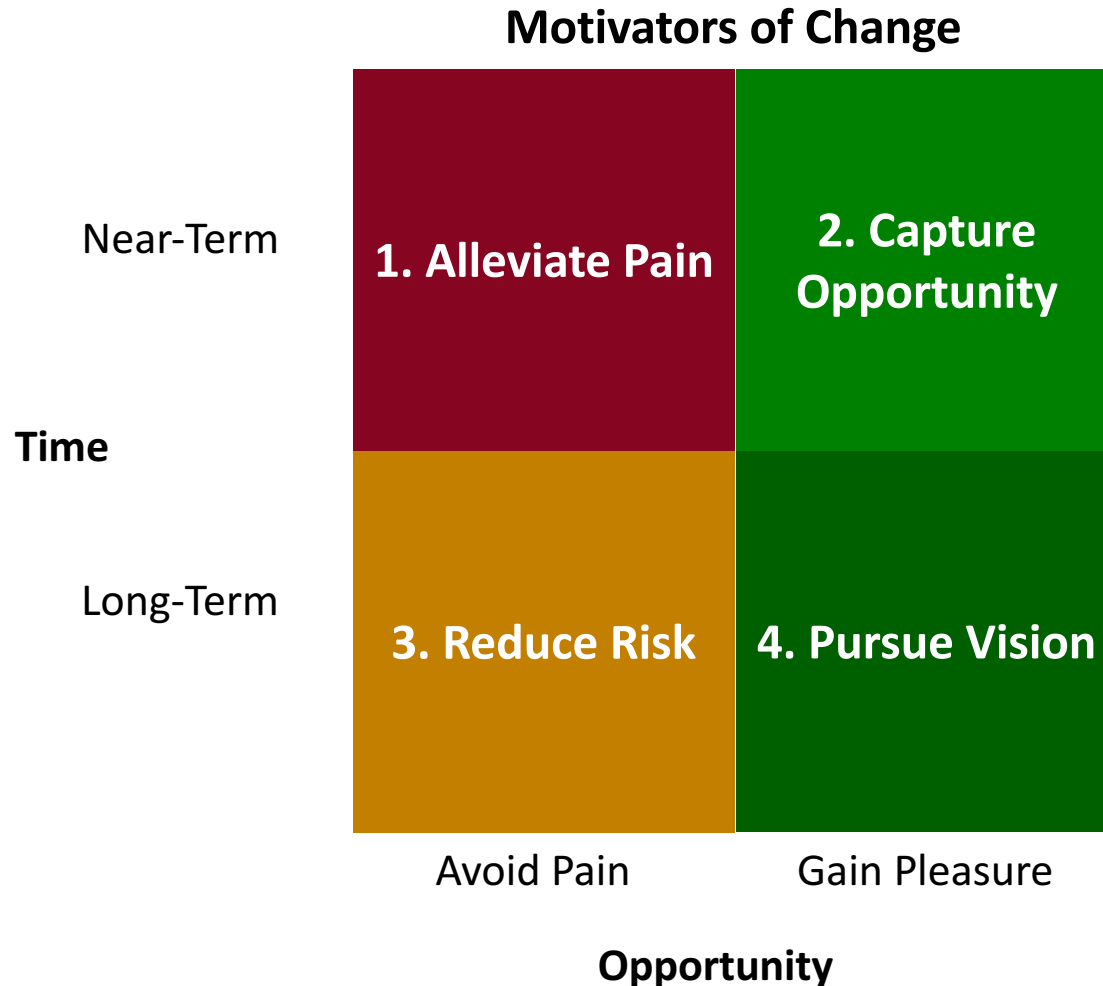
change

What's the Right Motivator for Change?



change

What's the Right Motivator for Change?



Message: "If we don't move now, some of us will be looking for new jobs this time next year."



Response: "I'm on board. What do we need to do?"

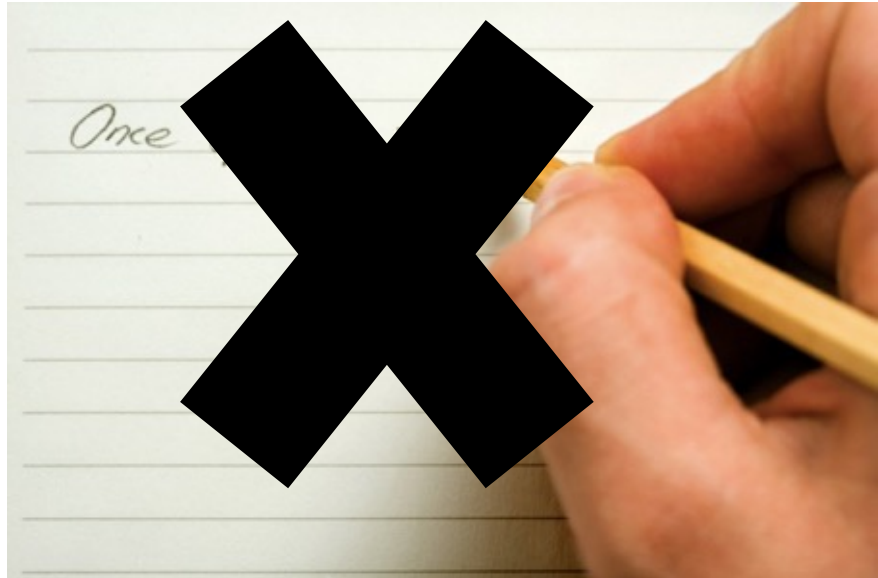
story

The Change Story

The change story is the first incarnation of the key messages and themes.

It includes:

- **What** the change is (sales comp, sales channels, job roles, merger, etc.).
- **Who** will be affected (the sales organization, major accounts, one region, etc.).
- **When** the change will take place (and the length of the process).
- **Why** the change is necessary now, as opposed to the past or future.



Change Forecast

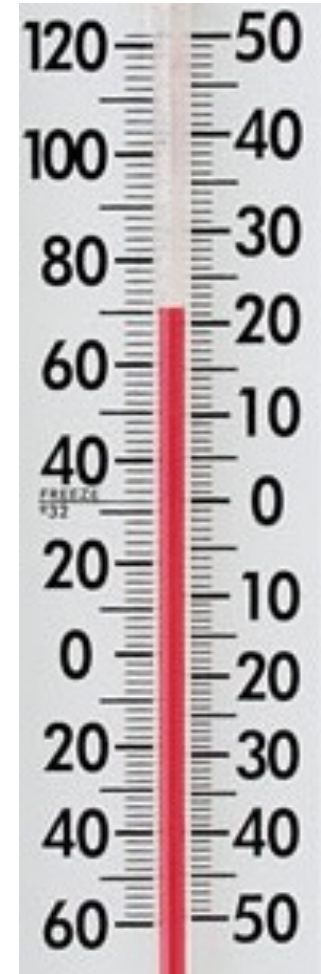
forecast

Change Forecast. The Key Questions

1. What degree of change? (1 minor-10 major)

On a scale from minor adjustment to major strategic change, what degree of change will this be for the organization?

Four simple questions to help you understand the answer to this question.



forecast

Change Forecast. The Key Questions

2. When was the last time? (1 recently-10 never)

When was the last time the organization implemented a change to the sales compensation plan?

The longer the current plan has been in place the more resistant the organization may be to change.



forecast

Change Forecast. The Key Questions

3. What's the organization's tolerance?

(1 high-10 low)

How much change can the organization handle?



forecast

Change Forecast. The Key Questions

4. What's your management team's tolerance? (1 high-10 low)

How important is it to make this change?

At what cost?

What level of breakage are you willing to sustain?

A. "We need to move this organization to a true sales culture and kill the environment of entitlement."

B. "We need to take care of the team. The VP of Sales calls the organization his 'kids' ".

forecast

Change Forecast. Summing It Up

1. What degree of change? (1 minor-10 major)	7
2. When was the last time? (1 recently-10 never)	4
3. What's the organization's tolerance? (1 high-10 low)	4
4. What's your management team's tolerance? (1 high-10 low)	8
	<hr/>
	23 moderate

What's It Mean?

Score of:

1-10: Smooth Sailing- Use normal modes of communications and management.

11-20: Choppy Seas- Carefully plan, enhance clarity, test responses.

21-30: Gale Winds- Use multiple communication modes, close change management.

31-40: Potential Storm- Brace yourself Effie... strong leadership messages, change management, potential "hammer".

Learning Modes

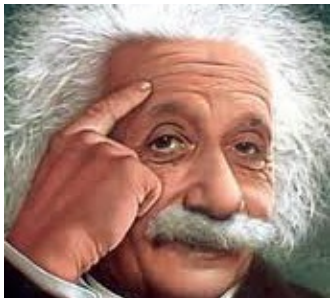
modes

Addressing Learning Modes

Consider using a variety of communications methods that align with learning modes*.



1. Linguistic: Have rich vocabulary and sensitivity to the meaning of words, Learn through language, both in writing and orally. Successful learners by listening and hearing, and through telling stories. Sort the information through their listening and repeating skills.



2. Logical-Mathematical: Have ability to see relationships between objects and solve problems, as in calculus and engineering. Use numbers wisely and enjoy solving problems. They have the ability to understand logical patterns, categories and relationships, causes and effects.

For Implementing the Plan

Use Verbal Messages and Conversations- Group or Individual

Use Plan Calculators and Examples and Be Clear on Comparisons to Prior Plan

*Howard Gardner's Multiple Intelligence Theory

modes

Addressing Learning Modes



3. **Visual:** High visual intelligence translating information into images and pictures.



4. **Kinesthetic:** Learning through touch, manipulating, and movement. Activities, games, acting, hands-on tasks, building.



5. **Musical:** Recognize tones, rhythms and musical patterns. Can remember and repeat a melody after listening it to once.

For Implementing the Plan

Use Visual Models

Use Demonstrations or Role Plays

Use Messaging and Phrases to Reinforce. “55 to Stay Alive”

modes

Addressing Learning Modes



- 6. Interpersonal:** Understand and care about people and their feelings, and interact effectively with them. Have the ability to influence people and are natural leaders.



- 7. Intrapersonal:** Ability to think about and understand one's self. Aware of their strengths and weaknesses, moods and motivations. They have the ability for self discipline to achieve personal goals. Prefer to study individually.

For Implementing the Plan

Use Messages About the Organization, Conversations, and Enlist as Supporters

Use Messages About Personal Growth and Allow Time to Absorb Before Follow-Up

Quotas...



challenges

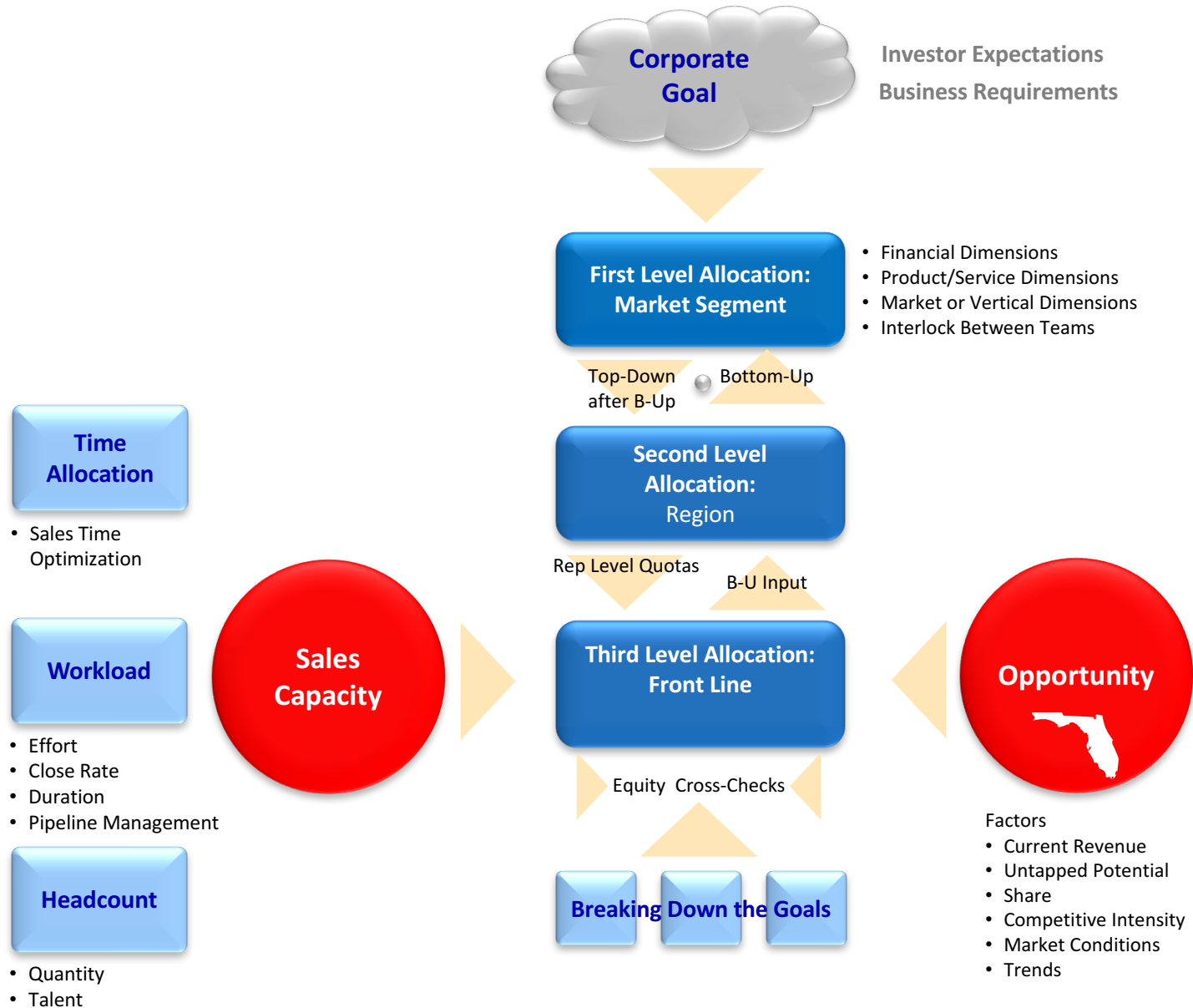
Top Quota Challenges



Many Challenges are People and Process Related.

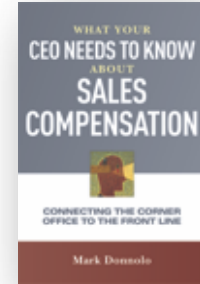
big picture

The Quota Success Model



methods

A Range of Quota Methodologies



Chapter 6:
Quota Quandary

- All Opportunities and Resources are Equal
- History Predicts the Future
- History Considering Market Differences
- Historic and Predicted Trends
- Correlates Predictors of Potential
- Pipeline and Market Variations
- Living Account Planning Process



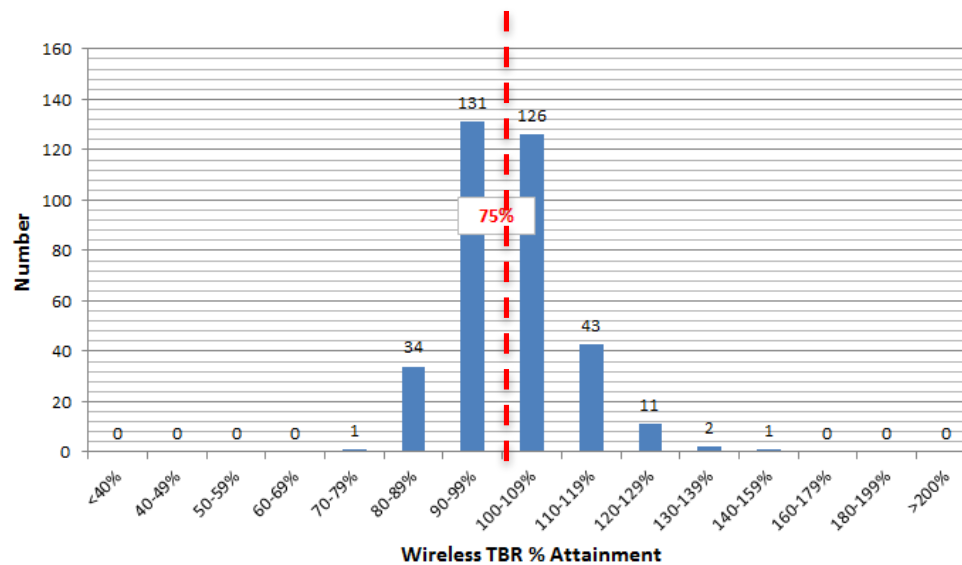
Success

Quota Attainment Distribution

We want 50% to 70% at or above quota.

Why?

- Business Plan Predictability
- Management of CCOS and Accelerators
- Motivation... A Culture of Winners



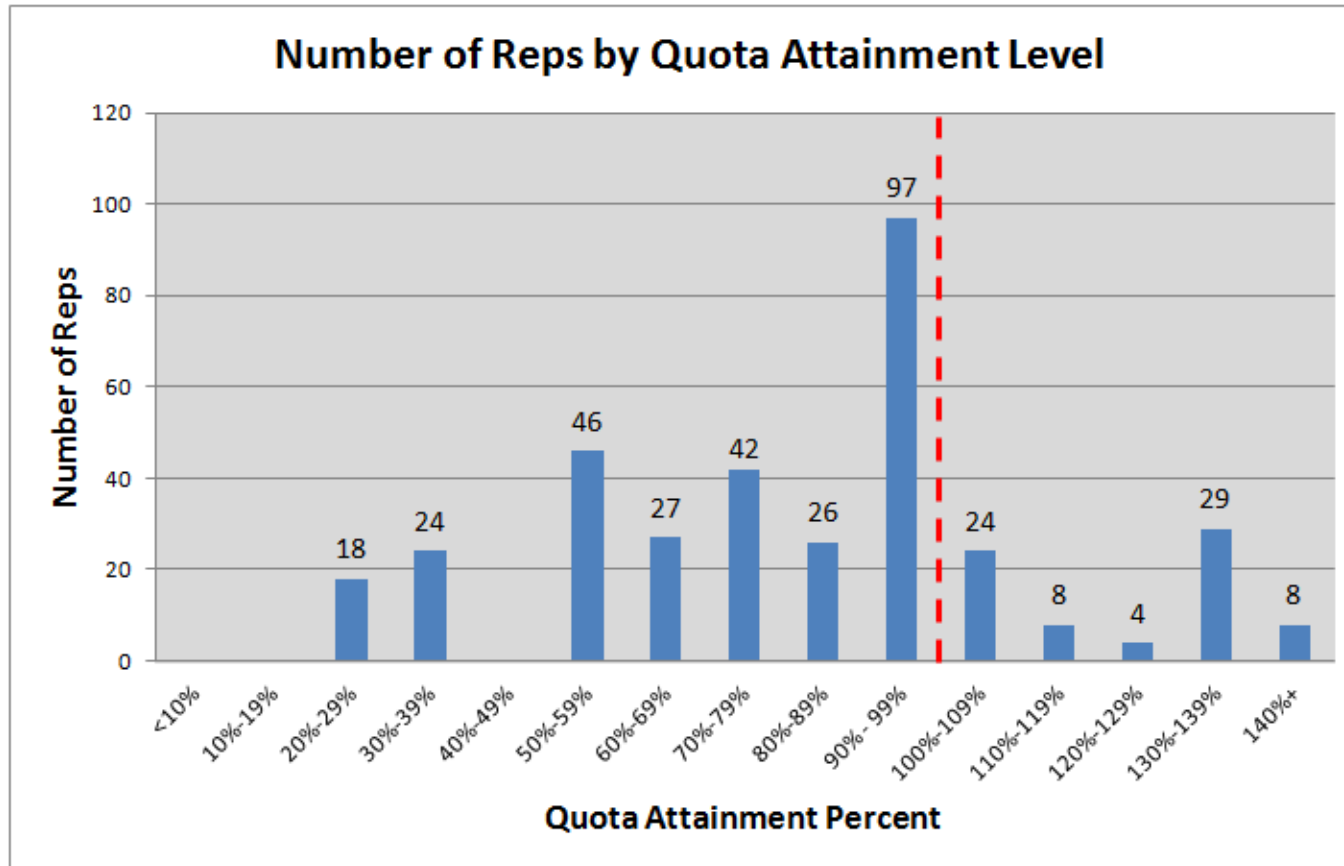
What We're Looking For

- 50% to 70% at or above quota
- Predictable distribution

forensics

Quota Attainment Distribution

Only 31% at or above quota.



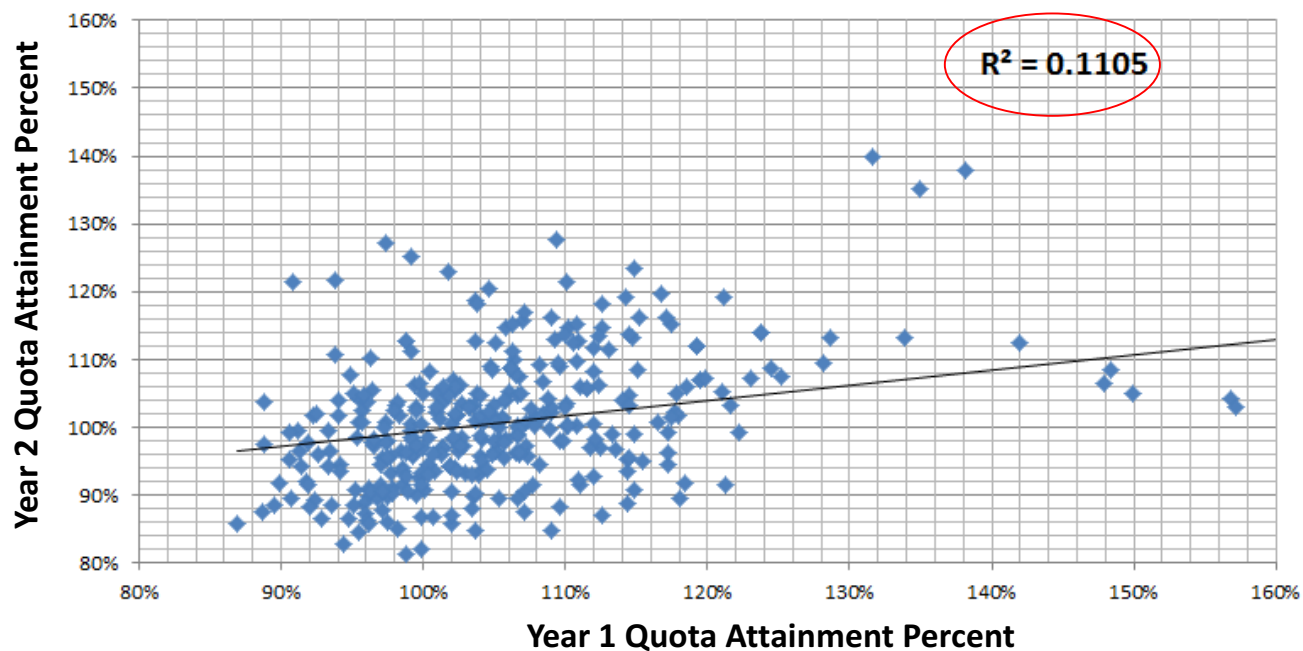
Diagnosis Questions

- Why are there sticking points below quota?
- Is this a quota, plan, or performance issue?

forensics

Year Over Year Quota Attainment

No relationship with YoY attainment.



What We're Looking For

- YoY consistency in quota attainment by rep

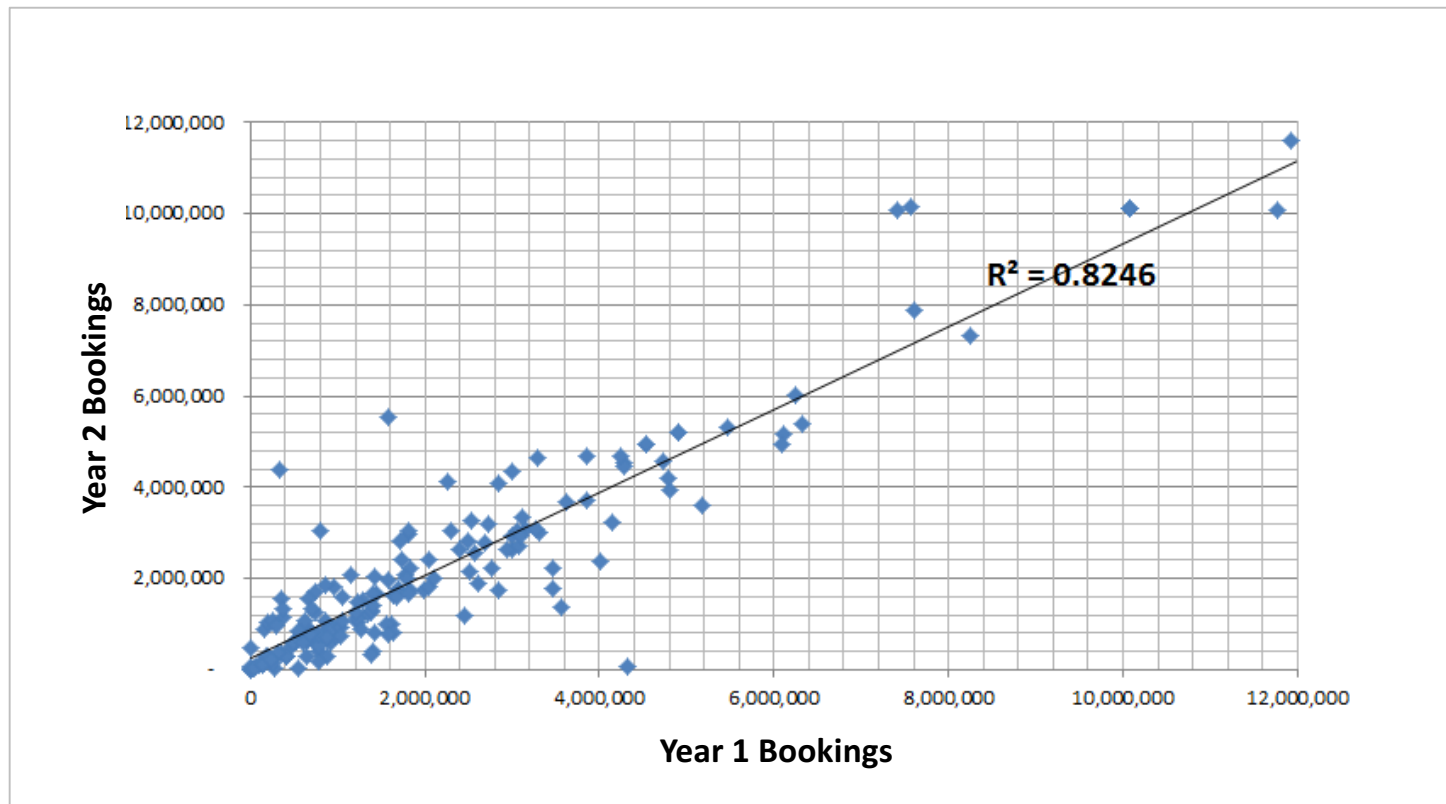
Diagnosis Questions

- Why is quota attainment sporadic?
- Is this a quota or performance issue?

forensics

Year Over Year Bookings

But strong YoY sales performance relationship.



What We're Looking For

- Removing quota from the analysis
- YoY consistency in absolute performance by rep

Diagnosis Questions

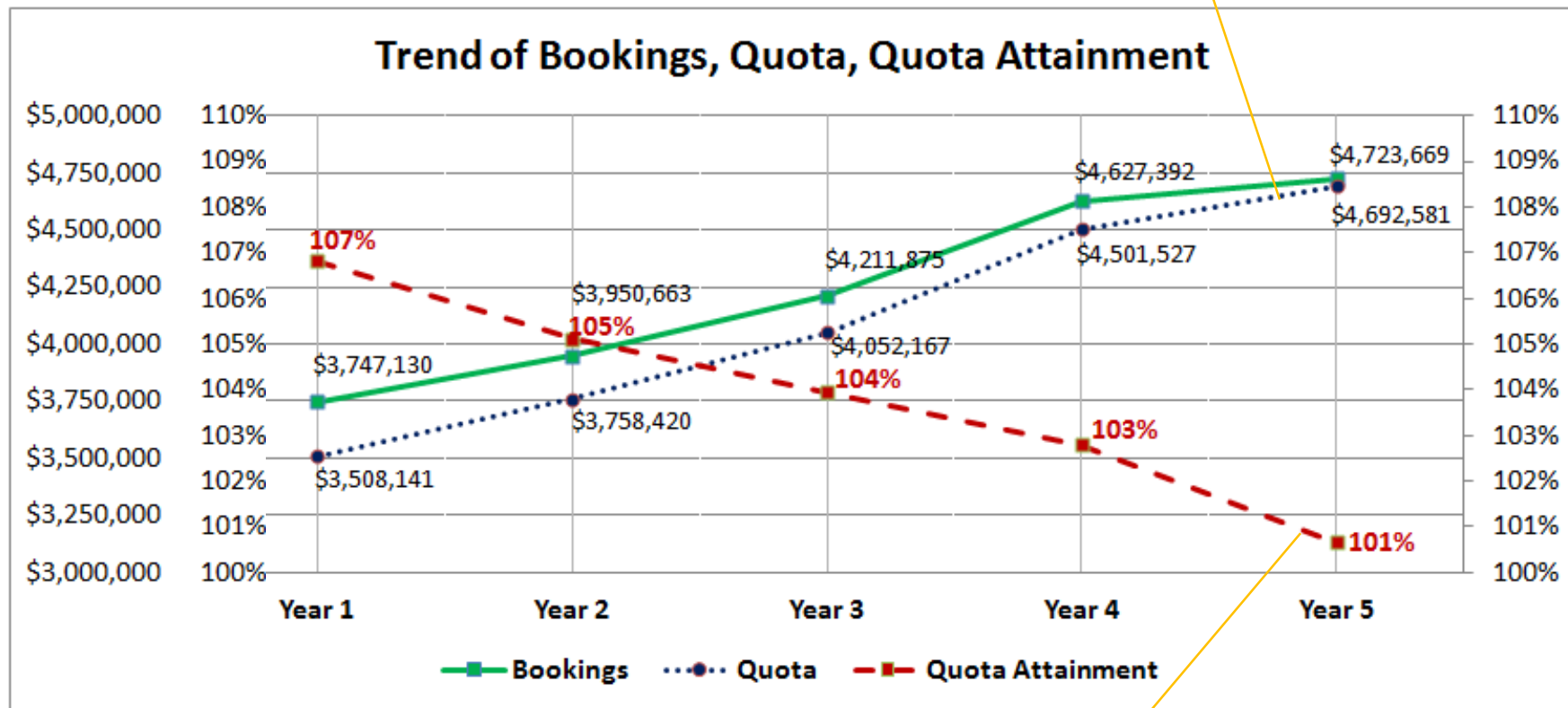
- Why is performance consistent?
- Are quotas set historically?

forensics

Company Goal Attainment

The big issue: Declining organization and company performance.

Increasing Quotas

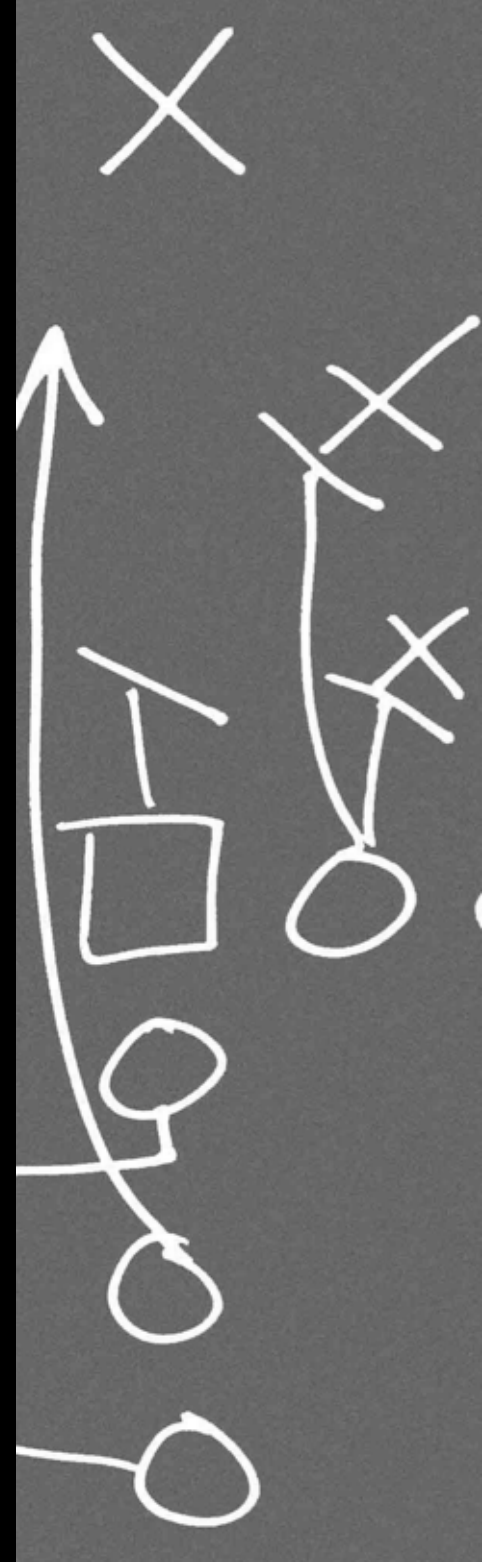


Declining Organization Target Attainment

Success Factors for Better Quotas and Communications

- 1. Consider all of the change story elements in the communication plan.**
- 2. Understand the organization's change tolerance.**
- 3. Consider multiple modes of communication.**
 - Provide open forum for questions as well as one on one time.**
- 4. Develop a structure and timeline to keep things on track.**
- 5. Use market-driven quota processes.**
- 6. Understand your sales capacity to balance quota capability.**

Panel Session: Global Harmonisation



definition

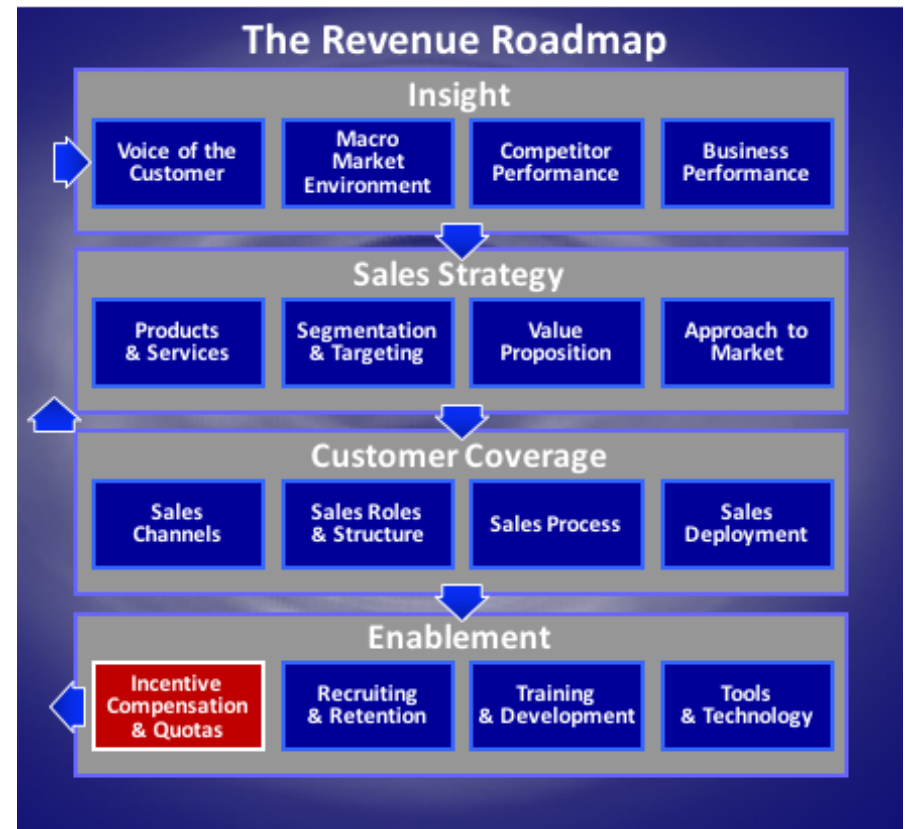
Global Harmonisation

Global Harmonisation Defined:

“All Core Components in a Business Discipline Work Together in a Common Framework That Produces the Expected Result.”

Key Point: Harmonisation doesn't mean “the same”.

Core Disciplines The Revenue Roadmap



ahead

Thanks... Now Take Action!

1. Read the Book to Align Your Team

Here, Amazon.com, BarnesandNoble.com



2. Sales Comp Workshop

One Day to Better Comp and Quotas



3. Get Your Sales Comp Report Card

WhatYourCEONeedsToKnow.com

The image shows a stack of four report cards, each with a different header: 'Category 1 - Overall Sales and Sales Mix', 'Category 2 - Training New Hire', 'Category 3 - Selling Pay and Performance', and 'Category 4 - Selling Team and Executive'. Each report card contains various data points, percentages, and a grid for tracking performance.

Questions and Counsel:

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Michelle Seger- MSeeger@SalesGlobe.com; 770 331 7531

Alan Gibbons- AGibbons@SalesGlobe.com; +44 (0) 7768 812530

Thanks!



www.SalesGlobe.com
(770) 337-9897



STRATEGY



TRAINING



COMPENSATION

Appendix



Sales Performance... Our Sole Focus

SalesGlobe is a thought-leading sales innovation firm that works with clients to combine analytics and creative principles to develop new approaches that give them a competitive advantage.



A few publications from SalesGlobe.



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We work with our clients to get ROI through attainment of financial and strategic objectives. Our work includes:

- **Sales Strategy and Transformation.** Undertaking significant strategic and organizational changes across multiple sales effectiveness disciplines.
- **Account Segmentation and Team Alignment.** Identification of growth opportunities, definition of optimal segments, and deployment of the sales team to accounts.
- **Voice of the Customer Insight.** Understanding customer expectations, company performance, competitor performance, and developing strategies to address gaps
- **Sales Process Optimization.** Development of the sales process and customer engagement model that incorporates sales roles and interaction points.
- **Sales Organization Design.** Sales role and organization structure development to align with the sales process and engagement model.
- **Sales Operations Improvement and Management.** Optimizing and operating the critical support and sales enablement roles for your organization.
- **Sales Capacity Planning.** Improving performance for sales time allocation and sales workload to increase team productivity.
- **Talent Assessment.** Optimal talent and skills definition, individual-level capability evaluation, and organization change planning.
- **Strategic Account Planning.** Account level growth strategy with the sales teams, supported by a living account planning process.
- **Sales Compensation.** Incentive program design and implementation to motivate and align the sales team and customer-facing roles to the organization's C-level goals.
- **Quota Setting.** Market-based goal setting to allocate the overall company sales plan and improve team and business performance.
- **Technology Readiness.** Assessment, requirements definition, and support to implement sales technology platforms that enable the organization.

biography

Mark Donnolo



Mark is a founder and managing partner of SalesGlobe, a thought-leading sales innovation firm that works with clients to combine analytics and creative principles to develop new approaches that give them a competitive advantage. SalesGlobe works in areas that include sales strategy, sales organization design, sales training, and incentive compensation. Mark's work spans several industries including technology, communications and media, business services, healthcare, manufacturing, staffing, and financial services.

Mark is also a founder and managing partner with the SalesGlobe Forum, a community of senior sales executives that provides a environment for addressing critical growth issues, sharing best practices among members in a confidential environment, hearing outside speakers, and building business relationships with peers in non-competitive businesses. The Forum operates with professorial guidance from Georgia Tech's College of Management and SMU's Cox School of Business.

He was a Senior Vice President with MarketBridge, leading the firm's Sales Effectiveness Practice. He was also a Partner and Senior Vice President with Sibson Consulting, where he was on the firm's management team and led its Sales & Marketing Effectiveness Practice. Previously, he was a Vice President with The Alexander Group and a consultant with Siegel & Gale/Saatchi & Saatchi, an international marketing and advertising firm. Mark also launched CoalTek, an emerging clean energy technology company with operations internationally, including China. He co-founded and was CEO of Biltmore Communications, and was President of InfraStream, a venture-funded VoIP service provider.

Mark holds an MBA from the University of North Carolina at Chapel Hill and a BFA from The University of the Arts in Philadelphia.

Mark speaks on sales and marketing topics and has been published in publications that include *Fortune*, *Sales & Marketing Management*, *Selling Power*, *Telephony*, *Investment Property*, *Telecommunications*, *Velocity*, *Workspan*, *American Way*, and *Marketing News*.

He is the author of the books "The Innovative Sale", "What Your CEO Needs to Know About Sales Compensation", and "Essential Account Planning"

Mark serves on the Board of Trustees of The University of the Arts, founded in 1876 as the Philadelphia Museum and School of Industrial Art, now the country's first visual and performing arts university.

biography

Michelle Seger



Michelle has a strong background in management consulting and change management. Her portfolio includes ERP implementation, strategy execution, revenue management, new product introduction and innovation, acquisition integration and partnership development and execution, and organizational design. Michelle is adept at root cause analysis and identifying practical solutions for our clients. Industry experience includes: financial services, technology, manufacturing, retail, consumer products, and hospitality.

Michelle has more than 20 years experience in process improvement, benchmarking and best practices development. She is very effective at working cross-functionally to bring change to a company and is a collaborative team builder with strong communication and facilitation skills. Her problem solving approach that includes a balance of practicality and creativity leads her clients to business solutions that are implementable and bring about the desired results.

Throughout her career as a management consultant focused on global organizations and as a master franchise owner of an international Italian business, she has developed a keen understanding of the challenges global companies face in their quest to build a common platform of collaboration and support in a multi-national and multi-cultural environment. Her ability to work within the organization of a company to build harmonization and affect change in a way that builds bridges to the strategy is proven and effective.

Highlights of her business experience and client work includes: Accenture, US Bank-Elavon, Georgia-Pacific, and includes direct consulting to a broad range of global to small and mid-size companies across multiple verticals.

Michelle graduated from Emory University and has a BA in Spanish and EMBA.

She has an interest in children's welfare and served as Treasurer of Camp Horizon a non-profit dedicated to providing opportunities to children in Georgia in foster care, and the Executive Women of Goizueta where she was instrumental in the development of the philanthropy committee.

Client Accomplishments Include:

- Identification of plan and delivery of an innovative client-facing value-added program within the financial services industry that effectively off-set federal regulations compliance expense and provided \$14M net recurring revenue.
- Implementation of innovative products to transition a transactional commoditized business into one that provides a clear value proposition and a consultative approach to support the growth products and services to its clients within the financial services industry.
- Extensive process improvement work with achievement of the client result that includes: cost-savings, reduced cycle times, improved customer experience, technology alignment, pipeline activity management and process transparency, clarity and clear roles, responsibilities and rules of engagement.
- Development of strategic partnerships between global companies and mid-size small companies that provides tangible value and revenue opportunities to all parties.
- Successful integration businesses from a change management perspective.
- Implementation of a call center for a global manufacturing company that included cross-functional responsibilities to improve call response and issue resolution time.
- ERP implementation activity that includes: organizational design, roles and responsibilities identification, training and needs assessment and roll-out, and project management.
- Development of internal benchmarking and process improvement methodology for specific fortune 500 clients tailored to their business abilities.
- Design and implementation of a new process for a global company to manage its internal project pipeline activity.
- Vendor management and contract negotiations.
- Retail store development and personnel readiness including all aspects of sales operations and store management that includes: hiring and onboarding, sales process, rules of engagement, training and development, systems and tools, and compensation.