



Case Study: Strategy Skill Development for Sales Management

Client

Pharmaceutical Company

Target Audience

Managing Directors, Regional Account Managers, Area Sales Managers

Challenge

Lack of a uniform approach to strategic planning has led to a large performance gap in the various regions of North America.

Needs

- ❖ Create a universal understanding of the key business planning concepts and terms.
- ❖ Provide sales managers with practical tools they can use on a regular basis to effectively and confidently set the strategic direction for their business.
- ❖ Design a single strategic sales plan template (2 pages) that creates a common language and process to more efficiently discuss, review and modify the business across the entire sales management team.

Solutions

1. Review of the current strategic management techniques, tools and frameworks to get a baseline understanding of the "As Is" situation.
2. Telephone interviews with a representative sample of managers to gauge likes, dislikes, needs and wants relative to strategic planning and management.
3. Participants completed the Strategic Thinking Assessment to baseline pre-program strategy skill levels. The Strategy Survey was taken to help managers focus on the key elements of their business relative to market, customers, competition and company. A pre-read article was electronically distributed to prepare for the one-day workshop.
4. Development and facilitation of one-day sales management off-site meetings to workshop on strategic sales concepts, tools and frameworks. Resources included the Deep Dive workbook to immediately apply the learning's to their business, and the hardcover book, *Deep Dive: The Proven Method for Building Strategy*.

5. Completion of the StrategyPrint template by managers to use as a two-page blueprint for their business, providing that critical link between their strategic plan and their daily activities.
6. Managers received access to the Strategy Vault online resource center, which includes a library, strategy templates, instructional videos, MP3s, insight logbook and strategic thinking software.

Client Results & Comments

- ❖ Training leaders reported positive feedback from 100% of participants on the value of the concepts and tools from a strategic sales management perspective.
- ❖ Sales leaders increased their effectiveness and efficiency by having one common language or set of definitions for the key business planning terms (goals, objectives, strategies and tactics) to achieve consistency in setting direction.
- ❖ Sales leaders reported this was the first time they've had a set of practical tools to set strategy for their business and update that strategy on a regular basis versus once a year.

Managing Director:

"I am building my team's strategic thinking skills with the following tools – contextual radar, the five forces of competition, SWOT alignment, value factor analysis, resource allocation calculator, and the StrategyPrint. Personally, I felt it was the best training session I've attended in my 20-year career."

Vice President, Head of Sales Force Effectiveness:

"I thought that yesterday's strategy session presented by Rich Horwath was very well done! The topic, Rich's messages and the materials were relevant and importantly, actionable! 3 A's of Strategic Thinking - Acumen, Allocation & Action. The follow-up provided by the text *Deep Dive* is also an excellent way to pull-through the learning's from this conference. We have incorporated Rich's model of Strategic Thinking into our Leadership Training for all Managing Directors, Regional Directors and First Line Managers."

Director, Leadership Training

"Rich is the author of an outstanding book on strategic thinking entitled, *Deep Dive*. He is extremely knowledgeable on the topic of strategic thinking and has a knack for teaching the fundamentals to others. He is a dynamic speaker who demonstrates key learning's extremely well. Rich has developed a comprehensive and valuable Strategy Vault of strategic resources to sustain the training for our team moving forward."