



PERFORMAX Customer Success Story:

Bell Ontario - SME Sales

NB: Each Solution is based on a real Customer Engagement using Customer Quotes wherever possible

Customer Situation

The Sales Force of Bell Ontario and Quebec aimed at the Small to Medium Business Enterprises needed to:

- a. Become more focused and competitive (in the face of a growing number of competitors).
- b. Adapt to selling new products, services, and solutions.

Thus, when the Senior Management Team looked at PERFORMAX's **Opportunity Planning & Management** Program, they realized that this was a *change management* vehicle that could help this process.

PERFORMAX Solution

In working with the Senior Sales Management and Training Group, the workshops and tools* of the **Opportunity Planning & Management** Workshop were customized for Bell, along with a Train-the-Trainer Module as multiple facilitators were needed to handle the 400 or so Sales Professionals and Sales Managers.

*The tools included:

- a. A Personal **Success Checklist**, or Ideal Person Profile
- b. An early version of **The PERFORMAX System** for Opportunity Tracking & Forecasting System with a Win/Loss Sub System
- c. A **Sales Plan**.

There were different versions of the above for Sales & Sales Managers, as there were for the Workshops whose basic Agenda was:

Opportunity Planning & Management Workshop:

1: The Basics

[Sales Management vs Selling for Managers]
Process vs Results Management
Focus on Your Key Controllables

2a: Leadership through your Strategy & Plan

Sample Plan
Overnight Exercise: Develop Your Plan

3: Opportunity & Activity Management

Recap of the Sales Process
Quantity Management
Sales Activities
Sales Opportunities
Quality Management
Sales Activities
Sales Opportunities
[Personal Selling for Managers]

2b: Leadership through your Strategy & Plan

Live Plan Presentations

4: Review and Start using the System

5. Wrap Up and Evaluations

The Workshops were piloted on a group of Sales Managers and a group of Sales Professionals all of whom were very positive, and made some good suggestions for improvement before a mass roll out for the whole team which only took 3 weeks.

Measurable Outcome

The basic outcomes were that:

- a. The Sales Professionals understood their roles more precisely, had a process to sell by (especially for the new products, services & solutions) and the tools to help them be more effective
- b. The Sales Managers now understood their management roles, along with the same toolset and review processes to help perform it effectively.