



PERFORMAX Customer Success Story:

Xerox MVS (Outsourcing)

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

Customer Situation

When a country subsidiary of Xerox formed a new Division to provide Outsourced Multi Vendor Customer Services, a new National Manager responsible for Sales was hired with experience in both the computer and printing industry, who then hired PERFORMAX after finding that:

- Most of the sales force for the new division were recruited from Xerox Customer Service Personnel
- The senior management team's experience was also entirely around Servicing of Xerox's products and the related business models of fairly fast decision cycles with well established buyers
- The new sales force were not used to calling on Senior Executives armed with value propositions and tools to develop clear ROIs for prospective buyers.

Thus there was no methodology for:

- Targeting Ideal Prospects
- There was no Customer Buying Process aimed at larger \$ Decisions with longer Sales Cycles
- Funnel Management built around such a Process.

Above all, most of the new Sales Force needed a paradigm shift from their former, mostly reactive Customer Service Roles to become a proactive Sales Force of Hunters.

PERFORMAX Solution

In working with the new National Marketing & Operations Manager, a 2 Phase Program was set up:

Phase 1's Objective was to ensure that Sales and Sales Managers knew "What to do, Who to do it to or with; and How often"

Phase 2's Objective was to raise the skills to be able to do their jobs effectively.

Or in more detail...

Phase 1 - The workshops and tools* of our **Opportunity Planning & Management** Workshop were customized for the new Division's Sales Managers (**For Sales Managers Only**) and for their Sales Professionals (**For Sales Professionals Only**).

Phase 2 - The workshops and tools of our **Selling High** Workshop were customized for delivery to both Sales Professionals and Sales Managers.

*Specifically the tools included:

- a. A definition of the criteria for the Ideal Suspect for the Outsourcing Services
- b. A multi step Customer Buying Process where step 1 was simply a target Suspect Company that was close to the Ideal Suspect criteria. And later on in the process, there was a clearly defined step which forced sales people to call on the appropriate decision makers
- c. An version of **The PERFORMAX System** for Opportunity Tracking & Forecasting System
- d. A **Sales Planning Template** which clearly helped each of the Sales Managers and Sales People work through to understand their activity levels needed to be successful.

Phase 1 – Implementation

The above were then previewed in the **Opportunity Planning & Management Workshop** for the Sales Managers, which showed why & how to use these tools and processes, and whose basic Agenda was:

Opportunity Planning & Management Workshop:

1: The Basics

Process vs Results Management

2: Focus on YOUR Key Controllables

3a. Leadership through your Strategy & Plan

Sample Plan Review

Overnight Exercise: Develop Your Plan

4: Opportunity & Activity Management

Recap of the Sales Process

Quantity Management

Sales Activities

Sales Opportunities

Quality Management

Sales Activities

Sales Opportunities

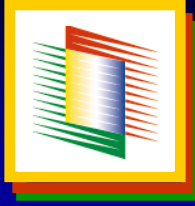
3b: Leadership through your Strategy & Plan

Live Plan Presentations

5: Review and Start using the System

6. Wrap Up and Evaluations

The Management Workshops were followed by similar Workshops for the Sales Staff, but after



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receiving inputs and modifications from their Managers.

Phase 2 – Implementation

A few months after Stage 1 Implementation was completed, the Sales Force skills were raised in our **Selling High!** Workshops, whose agendas were...

Selling High Workshop:

1: Intro to Selling Value & Solutions

2: Selling High

- 2a. The Need to Sell & Call High
- 2b. Review of Sales or Customer Buying Process
- 2c. Initial Targeting & Research + 1st Meetings
- 2d. Meetings with Executive Decision Makers
 - Gaining the Appointment [Role Plays]
 - The 1st Executive (Open Book) Call [Role Plays]
 - The 1st Executive (Presentation) Call [Role Plays]
- 2e. Other Steps in the Sales Cycle

3. Wrap Up and Evaluations

Measurable Outcome

In addition to each sales person having a clear plan of what they needed to do to by Quarter to reach their Sales Goals, the Customer Buying Process enabled both Sales & Sales Management to understand

where each Opportunity was, and whether to invest in next steps or not.

In addition to the sales skills development module, the key management skills to conduct value added Forecast Reviews were also addressed.

Here is an extract from a Reference Letter from the new National Marketing & Operations Manager:

"The strategy underlying the "For Sales Managers Only" [FSMO] and "For Sales Professionals Only" [FSPO] sessions represents a new direction for Xerox MVS, and you and your staff delivered the training in an informative, relevant and easily understandable manner. The high energy and sense of humour demonstrated by your staff made the presentations a pleasure to participate in.

Meeting participants were asked to evaluate the FSMO and FSPO Sessions, and the sessions were ranked with an average score of 4.2 out of 5.

Peter, the information that you and your staff promoted will prove to be extremely valuable tools that Xerox MVS will use to further solidify our leading position..."