Delivering revenues, not just strategies, to companies worldwide since 1989.

*We are **REVENUE STRATEGISTS**.*

We help clients maximize revenues and increase the value of their businesses.

We specialize in:

- *Partner and channel strategies that maximize revenues and reach*
- *Finding untapped revenues by repurposing existing products and technologies*
- *Revenue Strategies to help clients prepare for merger, sale, or acquisitions*

Our clients are high tech and services firms located in the US and abroad.

We have been in business since 1989.

We are located in the San Diego area.

Revenue Strategy Review Uncovered Leadership Challenges

Despite an impressive list of marquee customers, our client was struggling to generate revenues. This engagement was a one-week initiative for a local San Diego company to help its CEO understand why the company was having a hard time gaining sales traction, and to identify ways to increase sales and achieve critical short term (90 days) sales objectives. The company is not named to protect confidentialities.

Our approach began with research, written confirmation of the problem to be addressed, and triage, i.e., identification and prioritization of major symptoms. Prior to our first meeting, we learned whatever we could about the company's industry, products, strategy, positioning, client base, financial situation, management team and history. On our first day on site, we met with the CEO and selected reports to hear their view of the situation and confirm our task. The CEO took us through the company's standard corporate overview, sales presentation, and product demo. We talked about the nature of day to day operations, and we received materials such as collateral and product plans to review. By the end of the day, we had identified the following as key symptoms to investigate: (a) inconsistent and overly-complex messaging, (b) a talented but otherwise ineffective sales team, (c) likely discrepancies in what the client marketed as its core competencies and technology strengths versus what it actually had, and (d) day-to-day operations characterized by firefighting rather than methodical execution of strategy.

To uncover to the root causes of these problems, we conducted a series of cross-organizational interviews with team members from sales, marketing, client services, and product development. By having individuals describe their jobs, backgrounds, and how they felt about how well the company was doing, we gained insights into (a) the quality of the company's products and services, (b) team depth and bandwidth; (c) and the effectiveness of key business processes. The interviews provided insights into root causes of the company's problems, including:

- **This client lacked an efficient sales pipeline management process.** Therefore, management was unable to properly forecast, track and incent sales success.
- **The client was outsourcing its marketing function** to a part-time contractor who, for a variety of reasons, was not satisfying the company's requirements for marketing materials, sales tools, and lead generation.
- **The client was definitely "overhanging" the market** with regard to its product capabilities, thus creating delivery and credibility problems that would only worsen if the company were to successfully increase the size of its active client base.
- **There were obvious personnel problems,** the most problematic of which appeared to be the CEO himself, who was *without question* the primary source of the company's tendency to firefight and churn.

In line with our project commitment, our next step was to provide actionable, short term solutions. While we recognized and would report on the bigger, more systemic problems uncovered, our next step was to address those things that could be dealt with immediately. We began with messaging and the sales toolkit. We spent day three in an intensive workshop with sales and the head of operations to create a new sales presentation that was simpler, more accurate, and that could be used consistently throughout the sales cycle. Finally, we completed a 60-page document detailing our recommendations, the rationale behind the new sales presentation, and the results of the interviews and working sessions. We later met with the CEO to confidentially discuss our concerns that he himself was a major source of the company's problem. Honesty is always the best policy, we find, even if it does not always lead to additional work. We have it from a trusted internal source that our recommendations have been beneficial.

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