



PIVOTAL

ADVISORS

BUILDING HEALTHY SALES ORGANIZATIONS

SUCCESS STORIES

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Pat Bailey is Vice President of Bailey Nurseries, which is located in the southeastern suburbs of Minneapolis/St. Paul. Bailey Nurseries grows trees, shrubs, vines, evergreens, rose plants, fruit trees, and perennials, supplying other nurseries, major wholesalers and retailers in the northern US.

Bailey Nurseries' relationship with Pivotal Advisors began in August of 2009, when Pat heard Mike Braun (owner/founder of Pivotal Advisors) speak at an executive conference, and continues to this day.

Aligning Sales With Growth Strategy

"Mike's message of aligning corporate strategy with a repeatable sales process really resonated with me", remarked Pat.

"We started working together in November of that year (2009) and initially focused on our strategic direction. We found their Six Selling Success Factors made complete sense and we started working on our Growth Strategy."

"The timing was good, as our industry was struggling due to the drop in housing starts from 2 million to ½ million annually. We simply had to change the way we approached the marketplace."

Territory Plans

"With Mike's help, we took a step back and reviewed our sales organization (a total of 30 inside and outside sales reps), as well as the market, and every territory. We learned that our reps were addressing their territories in their own way. We also noticed that we needed to pay closer attention to our "backyard" and "big box" retailers."

Sales people ... only respond well to those who have truly been there, done that, and have been successful. Mike is squarely in that category.

"We re-defined sales roles and job descriptions, restructured our sales force, and created new positions, which we were able to fill with internal candidates. Mike also helped us apply best practices to our sales process and we were off to the races."

Gaining New Business

"Our new structure and way of selling allowed us to penetrate the big-box retail market and secure a number of significant "wins" in our home turf, and nationally. We believe this was due to Mike's detailed territory-by-territory approach."

Changing The Sales Compensation Plan

"In the past, we were more concerned with year-over-year sales growth. Now, our reps need to accomplish specific goals and activities. Each rep creates a Territory Plan that is presented to our senior management team, which represents Sales, Marketing, Finance, Credit, and Production. Everyone asks questions to make sure the plan is aligned with our strategies. We're now focused on each rep's progress towards plan."

"Our reps check in with us several times each month to update us on opportunities, competition, and challenges. This allows us to make mid-course corrections instead of finding out what needs to be done when it is too late."

A Relationship Bonus

"Another benefit to the relationship with Pivotal is the strategic assistance we received during our most recent acquisition, in early 2015. That was a bonus."

Pivotal Passes The BS Test

"Mike presents half-day strategy sessions to our reps and he always receives high marks. Sales people, in general, have sensitive BS meters and only respond well to those who have truly been there, done that, and have been successful. Mike is squarely in that category."

The Bottom Line

"Without getting into specific numbers, I can say that our work with Mike and Pivotal Advisors got us on a sustainable track that has positioned us well to take advantage of the rebound in our market."

FOOD INGREDIENTS PRODUCER

"We were having issues with our sales organization's performance and we sought assistance from a marketing firm and one to perform personnel assessments. During this process, one of our consultants suggested that we also speak with Pivotal Advisors."

"I didn't know them from Adam, so we did our due diligence. When we consider partnering with someone, we look for people who are straight forward, honest, and have a style that really clicks with ours. We look for "what you see is what you get" people. After our interview with Mike and Gary we knew that they were a good fit."

"As we described our sales-related issues, on the spot, they gave us ideas that really resonated with us. We didn't feel as if we were the only organization with those problems. They were very sincere and very convincing."

"At that time, we were on the verge of removing our Director of Sales. Pivotal Advisors located a person who would head the department until we found a replacement. Mike and Gary suggested the person who would become our temporary head of sales, a great guy and a clone of Mike and Gary. He changed how our sales force worked and began to implement the Pivotal Advisors process."

"One of the many things that I like about them is the tools they have built around Accountability. Sometimes, sales people are individual cowboys who like to do their own thing. That doesn't mesh with our "You have to have a plan and you have to work it" philosophy. Pivotal Advisor's interim Sales Leader, came in very hands-on to work the plan and not let it sit on the shelf. This new person helped our existing sales reps develop new skills. This was a positive change, as we had become too lax, and did not have accountability. Our Sales Director wanted to be best friends with his staff."

"We have worked with Pivotal Advisors on and off over the last five years. They helped me find my replacement Sales Leader and, during that process, I realized that even though I had been hiring people for years, I wasn't doing a very good job. So, when we needed to hire another sales person, we needed someone who could define our ideal candidate and screen the applicants using those metrics. Gary helped me hire a new sales person, who is still with us after four years."

"He demonstrated how a good hiring process yields good, long-term employees. In the ten years I have been here, our new sales rep hire has proven to be the best sales person I have ever seen. With that in mind, I would never hire a Sales Leader or sales rep without Gary's advice. Although we don't always agree with each other we talk through our differing opinions and I make the decision."

"Here's an indication of how good Gary's process is. He helped us interview for a Sales Leader position and I ended up hiring someone who wasn't Gary's first choice. We both knew what the tradeoffs were and why I had hired them, against Gary's advice. My hire did not live up to expectations and that person is no longer here."

"I would never hire a Sales Leader or sales rep without Gary's advice"

"Gary has taken our sales force to a higher level and brought them new skills. An example is our Going Deep Project. He pointed out that our sales force had superficial knowledge of our clients' businesses, didn't do account growth plans, and as a result, weren't forming long-term partnerships with them. We work with food product manufacturers who are coming out with new products all of the time. We were approaching them on a one-off basis and not on a

“Pivotal is the only consultant that I have brought back for a repeat engagement.”

strategic partnership basis. We weren't segmenting our accounts. He did a great job working us through this. The skills that came out of that joint effort still positively impact our company.”

“Prior to becoming the President and CEO here, my prior experience had been in operations, finance, and

everything else except sales. I would say that working with Pivotal Advisors has made me a better leader of my sales leaders. I can relate to them, their challenges, know when key elements are missing, and how to guide them.”

“I work with Gary on an on-going basis. If I'm struggling with an issue, I call him and we spend a few hours talking about it. Gary is my personal coach, when it comes to sales matters. He is like a brother to me and really holds a special place in our hearts.”

“Companies go through transitions and people come and go. What I've learned from Pivotal Advisors I will always have. What is even more powerful is that knowledge applies to areas outside of the sales force.”

“How do I feel about Pivotal Advisors? Working with them has been an absolute love fest! I have worked with a number of consultants, from HR to Ops to Strategy over the years - and Gary and Mike are the best. The content and the richness of their knowledge are second-to-none. Pivotal is the only consultant that I have brought back for a repeat engagement. Actually, I have brought them back many times and wouldn't hesitate to bring them back again.”

NAHAN PRINTING

Nahan is an independent, family-owned and operated Commercial Print, Direct Mail and Digital Solutions service provider located in St. Cloud, Minnesota. As a leader in the printing industry, Nahan is the go-to resource and it committed to providing end-to-end solutions that add value to communications supply chains.

Meeting Gary and Mike (Teaching Auditors To Sell?)

"I became acquainted with Pivotal Advisors through KDV, our accounting firm, who had retained them to teach their auditors how to sell. They came to me highly recommended."

"At the time, I was working with another consultant/coach on the East Coast with deep experience in the print industry but wanted someone local, someone with real-world experience. I didn't want a "career consultant". I came into the job of leading 11 reps with no sales or print experience and was used to managing for outcomes. Mike and Gary quickly taught me that in sales I would need to manage activities, and the outcomes will happen. This sounds relatively minor but has significantly contributed to my success as a Sales Leader."

A Chief Administrative Officer Running Sales?

"It's pretty unusual that someone with my background would be chosen to lead a sales team. Nahan's senior management gave me the role because they believed that my finance background would add more structure and accountability. They figured that I could learn the print business and a consultant could teach me sales management. Pivotal has used their battle-tested methodologies to teach me sales management and have helped me succeed in sales management."

A Magic Report

"Being a "numbers guy" I wanted to begin regularly tracking sales and activity metrics. Mike and Gary suggested preparing a weekly Top Five Sales Report. The process is simple. First, ask the sales reps for their Top 5 achievements of the week. It could be sale, getting a hold of a prospect, or working 12 months to get a meeting with a particular print buyer. Second, consolidate the information for all the reps. Third, send it to senior management. It is a brilliant report. Senior management better understands what their sales reps are doing and have better visibility into the sales funnel!"

Pivotal Advisors is all about Straightforward, real-world advice.

"After a while I asked if we should stop creating the reports and senior management emphatically said, "No." They liked to know about the activity, especially around prospecting. This report has created a deeper level of trust with the sales team by highlighting all of the good activities that are going on within the sales department."

Turning the Tide on a Past CRM System Revolt

"A year later, Pivotal helped me implement a CRM system. There was no way that I could have done it without them. One of the complications was, two years before I joined Nahan, they had tried to implement a CRM system. There was an immediate mutiny and the lead sales rep refused to use it."

"I knew I needed to track prospecting activity and I wanted to implement a CRM but I couldn't figure out how to turn the tide. So, I asked Mike and Gary.

Here's the conversation:"

M&G: 'Tell them it's optional.'

Me: "What?! If I say that they are not going to use the system!"

M&G: "Tell them that they don't have to. But, if they don't use the system they don't get to keep their prospects."

"That's what Pivotal Advisors is all about. Straightforward, real-world advice. Nothing simpler than explaining a natural consequence to the reps of not doing what they are asked. We have now had the CRM system in place for 3 years and it has become part of the standard operating procedure of the sales department."

“Since working with Pivotal, we’ve had double-digit sales increases every year”

Motivating the Reps to Keep in Contact with Prospects

"Additionally, Mike and Gary suggested that I have someone review the contacts listed as Prospects in the CRM system. If there was no activity in the last six months, another sales rep can "claim" and work the prospect. That has really engaged our sales force in prospecting and documenting their activities."

Double Digit Sales Growth in a "Flat" Industry

Since working with Pivotal, we've had double-digit sales increases every year, which is pretty amazing since Direct Mail industry revenues are essentially flat.

The Dynamic Duo

"Mike and Gary complement each other, which is no surprise, since they are brothers. Gary brings a left-brain skill set – Gary did the blocking and tackling of the CRM system implementation. Mike taught me how to "manage" the sales expectations of the senior leadership team and develop my reps. They are the perfect dynamic duo."

Oh? Well Here's What Your CFO Would Say...

"One of the things that I have found helpful is Pivotal Advisors' monthly Sales Leader Alliance meetings. Although I wasn't as seasoned a sales leader as the other participants, I would often add a CFO's perspective to my SLA colleagues' ideas. Many times I would say, 'Interesting idea. Here's what your CFO might say about that.' I've called a number of the other participants in-between meetings for help and they always were willing to help me out."

On-Boarding and Keeping/Firing Reps

"It's really hard to quickly on-board a new sales rep and get them to be productive. It's also difficult to determine if, after some point in time, they should be kept-on or let go. The question is, how long should it take to get a new sales rep up-to-speed? In the past, if they were nice and tried hard, we would keep them on. If they were jerks, didn't work hard, and weren't particularly effective, we would let them go. We were all over the map and had very little structure."

"Mike and Gary helped us create the New Sales Rep Progress Report. We went back 15 years and plotted the month-to-month sales and profitability of 25 reps. Now, I can compare a rep who has been here 15 months with the first 15 months of other sales reps. Should we let them go? There are three of us who make that call and, with the report, we rarely have an argument. This is Accountability in action."

ORANGE TREE EMPLOYMENT SCREENING

Craig Vinje is the Chief Executive Officer of Orange Tree Screening, a market leading and premier provider of employment screening solutions to corporations across America.

Meeting Pivotal Advisors and Gary Braun

"We learned about Pivotal Advisors soon after moving an employee from Operations to Sales Management, which is a classic mistake. This was something new to our employee, and given the different skill set required, we told him to find someone to prepare him for the transition. He found Pivotal Advisors and started attending their Sales Leader Alliance roundtables. That's how we met Gary Braun, and we soon decided to engage him as a consultant."

Do We Have The Right Person?

"Gary worked with our new Sales Manager for three months. The purpose was two-fold: 1) to develop him, and 2) determine if he was the right person for the job. We had involved another consultant, with skills different than Gary's, and asked them both if our new Sales Manager could double our sales. Both Gary and our other consultant said, 'No, he will not be successful.'"

Plugging and Filling The Hole

"We asked Gary to 'plug the hole' by running our sales organization, and after 7 – 8 months, to write a detailed job description and a hiring profile for his replacement. Although our requirements for a Sales Manager are not unique, we needed to know exactly what was needed in our environment. We also like to hire from outside our industry to find flexible people without predisposed notions."

"Since Gary had 'been in the chair' and knew our priorities, he steered us in the right direction. That was helpful, because a typical search firm may not have known enough to find the candidates that were right for us."

"After we hired the new Sales Manager, Gary on-boarded and worked with him for three months. Gary also helped us hire an additional sales rep."

8X Growth in Eight Years

"I've been here eight years, and in that time, we've grown from \$2 million to \$16 million in revenue. I don't have a sales background, and needed really strong players in all of our sales positions. Gary has 15 years of sales and sales management experience. Because he knows the job, he really helped our company."

“ Since Gary had ‘been in the chair’ and knew our priorities, he steered us in the right direction.”

"I've been running companies for 25 years and have learned that you can't be all things to all people. When I started here, we had 1200 clients generating \$2 million in revenue. We now have 300 clients and one of the best revenue to employee ratios in the business. Gary helped us define our focus. When he first came in he said, 'You don't know who your ideal clients are.' which was correct."

Finding Our Ideal Customers

“With Gary’s help, we have determined that corporations with 3,000 – 15,000 employees are our sweet spot. They also have to be keenly interested in technology, because of our data integration requirements. We don’t want clients who fax us employment applications.”

“We are also not the least expensive alternative. Excellent customer service and integration capability does not come cheaply. Our sales reps need to sell Value, not Price.”

Pipeline Full of Fluff

“To understand our sales pipeline, we use our CRM’s funnel report to identify where our prospects are in our 7 stages. When we started working with Gary, he analyzed our 5th to 6th stage prospects and told us it was 80% fluff. I always say, ‘Bad news doesn’t age like wine.’ I’d rather get the facts, which is what Gary gave us.”

“Bad news doesn’t age like wine. I’d rather get the facts, which is what Gary gave us.”

Accountability

I now meet with our sales reps once a month and go over their 5th and 6th stage prospects. These decisions usually happen within 15 – 45 days. That how I keep a handle on what’s coming in. Our Sales Manager works with our sales reps and focuses on our 1st to 4th stage prospects and keeps track of the related activities.

No Boilerplate Here

Gary did a really good job for us and I have referred him to several other companies. I’ve worked with consultants who are 90% fluff and come in with a boilerplate solution. Gary is very flexible. He figured out what our problems were, gave me the facts, and made suggestions. I took the best ones and made them happen.

He helped us to become a better company.

RIVER OF GOODS

Lavina Lau is president and CEO of River of Goods, which was founded in 2000 primarily to serve home shopping networks. Since then, their custom home décor product customer base has grown to include catalog merchants, e-commerce sites, and specialty stores.

Another Referral to Mike Braun

"I was a referral to them by a consultant that I had retained. They knew that I needed help with sales management and told me about Mike. After speaking with him, I felt that he was very knowledgeable in sales management and very personable. I knew that my team could work with him, based on what he told me, and that he had all of the tools to make my team more productive."

First Things First

"The first project was an evaluation of our sales management system. Mike asked me for our sales organization chart, the responsibilities of each person, and revenue information. He also interviewed me, and all of our account managers. From there he made his analysis and recommendations."

“Getting a new employee up-to-speed is important and Mike provided us with a solid onboarding process”

"Mike evaluated six key areas. There were no major surprises, it was more a validation of areas that I knew we needed to work on. They were: Sales Team Structure, Compensation - to drive the results, and activity measurement - as an indicator of success. From this would come a formalized process of managing and developing our sales team."

Sales Team Structure

"Mike evaluated our sales organization chart and sales team and found that we needed to hire a sales director. He also recommended that we bring someone in from outside our company since we didn't have the right person on-staff. That was important because my increasing responsibilities didn't leave me time to manage our reps."

Finding a Sales Director

"Our new sales director had to relate to our exiting team because we believed in their capability and had no intention to change them. We were looking for someone with extensive sales management experience, a deep knowledge of CRMs, someone who could sell to bigger retailers, a sense of accountability, and who could thrive in a smaller company."

"Mike was involved in the interview process because he had worked with a lot of sales leaders and had a good handle on the characteristics that we needed. I had a good sense of our culture, and the dynamics of the team."

On-Boarding the New Sales Director

"Getting a new employee up-to-speed is important and Mike provided us with a solid onboarding process. I used virtually all of the steps, which really helped. When the new director came in at the end of December 2014, the 2015 sales plan was already formed. Our new sales director had to execute it and explain the model to the different business units. Next, our sales director met with the cross-functional leaders to learn how things get done here."

3-Year Planning Process

“We delayed our 3-year planning process so that our new sales director could participate. He was involved in the discussions, debates, and making the strategy decisions.”

Results

“Our sales team is getting a lot more coaching and guidance from the Sales Director, who has a great strategic mind. He is leading the sales team and giving them extra attention. He has taken that workload from me and has great experience and ideas.”

“I am very happy that he is here and he is doing a great job. Our sales cycle is long so we are setting reasonable sales expectation. Our sales are growing because of his extra focus. We are now more diligent in following up on our leads, have had a great product launch, and have acquired some significant new customers this year. I’m very happy with the results.”

Relationship

“I really like Mike and his people. They are extremely helpful, so much so, that I have signed up the sales leader from a River of Goods sister company to work with him. She has already gained a lot from that experience. Our new River of Goods sales director is going to Pivotal’s monthly Sales Leader Alliance meeting.”

What’s Next?

“The next project that we have for Pivotal Advisors will be working through our 2016 compensation plan process.”

“**Our new River of Goods sales director is going to Pivotal’s monthly Sales Leader Alliance meeting**”

Chris Lohn is Co-Owner of SetSight, which provides a comprehensive Big-Data software platform for suppliers and manufactures representatives seeking to optimize their retailer relationships. The platform allows their customers to gain insights from their “fire hose of retail data”.

Holding on too Tightly

Chris was referred to Pivotal Advisors while he was meeting with a few business consultants. “We were looking to scale our business and were ready to make some changes. As entrepreneurs, we were holding on tightly to everything, and you can't grow that way. To further complicate things, I had the entire sales process in my head and I needed to get it “on paper” so I could find a replacement, and focus on strategy.”

From my Head to Paper

“I had to formalize the structure for a sales team, learn how to find qualified sales rep candidates, how to interview them, set aggressive and realistic goals, how to track performance, and create an incentive program that would assist us in building our company. I also had to figure out how to grow the team, what goals to set, and which leading indicators to track against those goals. What is the right amount of calls, emails, and meetings – how do we track the close rate?”

“I did some of this work independently, and picked a tool to measure Key Performance Indicator's. Then we engaged Pivotal Advisors. Right way, I found that they were a great sounding board and I was able to learn from their experience and avoid making serious mistakes.”

Our Ideal Client

“The first thing that they helped me do is identify who our ideal clients are and writing it down, so that we could communicate that internally. Next, and this was really important, they helped us develop a client on-boarding process. Our platform is easy to use, which means that it has a lot of moving parts that the client doesn't see. It takes a while to get things right and get ready for turn-over.”

On-boarding and Developing Our Ideal Sales Rep

“Once we accomplished that, Pivotal Advisors helped us to define a profile for the hunter salesperson and the traits that would make that person succeed in our environment. Of course, just like bringing a customer on-board, we developed an on-boarding process for salespeople that would accelerate their productivity, and a means to develop them. We hold weekly sales meetings, followed by 1 on 1's, where we create and review each rep's individual sales plan. We also worked on define the “toll gates” in our sales process – how and where do we find our ideal prospects, so we don't waste time chasing bad deals.”

“Working with Pivotal Advisors turned me from a ‘How Guy’, where I was doing everything, to a ‘What Guy’ where I was able to delegate..”

Aligning Compensation with Strategy

Of course, aligning compensation with corporate goals was also important. With help from Pivotal Advisors, we were able to create a compensation plan that supported our requirements for new business, growing existing business, and introducing all things in our product mix to all clients.

From “How Guy” to “What Guy”

“Working with Pivotal Advisors turned me from a ‘How Guy’, where I was doing everything, to a ‘What Guy’ where I was able to delegate things that others should do. What I appreciate most about working with Pivotal Advisors is collaborating and bouncing ideas off of them. Sure, I could have done everything that I’ve accomplished myself, but it would have taken me 1 – 2 years and 50 mistakes later.”

No trial and error, and they give me short cuts that are worth their weight in gold.

Knowing What You Don’t Know

“The process allowed me to achieve one of my main objectives: I had to get out of the front-line and get some help to take it to the next level. For an entrepreneur, knowing what you don’t know is vitally important. Many of us are blindly optimistic and do not have the right processes in place – Good luck with that. Hopefully, you don’t run out of money or sales. Now, with Pivotal’s help I see 50 things I didn’t see before – and with their help, I can get my ideas to market faster.”

Draw the Map and Follow It

“I learned that putting the plan in place and drawing the map takes longer than using it, which is why many people don’t do it. The biggest difference is, working with them; I was able to get the right a high-level sales person on staff, which has freed me up to plan. Because I’m working with PA, I can spend my time thinking strategically and I don’t have to be involved in every deal.

Step Away and Scale the Business

“I used to be the sales guy. Although it’s difficult to find the right manager, when you do, and if you have the right processes in place, you can step away and scale the business. I can now measure what’s important and have determined that the processes put in place with Pivotal Advisors is working. I am now building different levels of scalability.”

Worth Their Weight in Gold

The most valuable thing about working with Pivotal Advisors is that I get to work with someone who can give me an answer based upon their experience. No trial and error, and they give me short cuts that are worth their weight in gold. They are phenomenal!

SUCCESS COMPUTER CONSULTING

Brent Morris is the National Sales Manager of Success Computer Consulting, located in the western suburbs of Minneapolis. Success Computer Consulting provides managed network support, advanced network engineering, outsourced help desk, business analytics, database, and reporting services.

Leaving the Corporate Treadmill

"I was on a steep, upward trajectory at a much larger company and decided to leave the corporate treadmill for a smaller company. There, it would be easier for me to "be real" and create a culture where we would do the right thing by our employees and customers."

I attended one of Pivotal Advisors' Sales Leader Alliance meetings and realized that they had "nailed" the Sales Leader process

Here are the Keys...

"I was brought in to Success to make some aggressive revenue increases happen by growing a sales team to ten members and managing them, which was a new challenge for me. Initially, we brought in a "traditional" sales consultant who got us on our way. Soon, I realized that I didn't have the depth of experience to develop the sales organization that I had created."

Meeting Pivotal Advisors

"Then, two years ago, I attended one of Pivotal Advisors' Sales Leader Alliance meetings and realized that they had "nailed" the Sales Leader process: Get the right people, systems, and processes in place and take the emotion out of sales management. I could tell right away that they had "been there and done that". Gary and Mike had more expertise than I, and knew that I needed their help."

Under the Hood

"The first thing that they did was to help me to let go of my sales group's issues and look at them in a mature way. Then I knew how they could assist me." I noticed right away that Gary and Mike had every situation I had presented them with "nailed". They gave me good advice, which was steeped in logic that helped me recast my team to be more functional and their assessments more fair."

Rep Development & Measurement

"Initially, our sales force didn't have a lot of resources and were left to themselves. That kept us from standardizing our value proposition and sharing what worked across our territories. We were figuring it out as we went along."

"Also, we were only tracking revenue and not the activities that lead to success. This was an oversight, in that our sales cycle tends to be long and when you don't pay attention to activities you are stuck on the revenue roller-coaster."

"Making it even more difficult was that we didn't have a hiring or an on-boarding process. That caused us to make some suboptimal hires and it took too long to get our reps productive. With the help of Pivotal Advisors, I have learned who I should be hiring, how to on-board them, what I should be measuring, how to develop my reps, and I have mastered the art of meeting with them 1-on-1."

Positive Impact

"I have to say that Pivotal Advisors has positively impacted every aspect of our sales organization, from strategy, to hiring, on-boarding, and developing the right people, and measuring and compensating them correctly."

"I've learned so much from them. If I were arrogant, I'd say that I have graduated from Pivotal! They took me through some very tough stuff. I have come to learn that they have way more experience than I and even though, thanks to them, my group is on-target. I have maintained a regular consultative relationship with them for two years and see that continuing into the future."

Reps "Getting" the Corporate Strategy

"As a Sales Leader, one of the toughest things to accomplish is to break-down the corporate strategy, turn it into a compensation plan, and deliver it to the reps so they know precisely what to do in the field. Gary and Mike are great teachers and have that experience. I find their anecdotes especially valuable. I remember one instance where I had presented Mike with a particularly tough challenge. Mike said, 'Man, that used to happen to me when I was working at [company X and company Y] here's a couple of things you should try... That is the most valuable advice one can get – it's not theoretical, it's tried and true.'"

Taking it to the Next Level

"I'm taking things to the next level and senior management can see the value that has been generated by our relationship with Pivotal Advisors. The owner of our company, who is the best salesperson that I have ever met, was confident enough in Gary and Mike's ability that they were allowed to go 'under the hood' of our company. They helped us redefine our corporate values and strategy, identified our unique competitive advantages, took us through a SWOT analysis, and defined our sales goals and sales support budgets."

Pivotal Advisors has positively impacted every aspect of our sales organization

The Bottom Line

"We have just passed a major sales milestone, which, in and of itself, is awesome. What's more important is that our growth was generated, as we had planned, in the healthiest areas of our marketplace. That's the best compliment I can pay to the folks at Pivotal Advisors: They've shown us the way, gave us the tools and encouragement to keep us on the path, and it's generating easily-measured results."

WILLIAMS SOUND - DOREEN INGEBREGTSEN

Doreen Ingebregtssen is Vice President, International Sales for Williams Sound, a global designer and manufacturer of wireless communication technology.

Doreen's current responsibilities include:

- International Sales growth, managing her team, (5 plus 2 International Manufacturers Rep organizations)
- Coaching, working with the team to strengthen their capabilities and knowledge
- Budgets, Forecasts, input to New Product Development
- Contributing at bi-weekly Executive team operations meetings, providing updates on Sales, Manufacturing, and Engineering
- Quarterly planning meetings, where performance is evaluated against our strategic plans
- Planning the international sales growth strategy

Working in Scotland

"In 1996, I was sales Director for a small company in Scotland that provided accessibility products. This included a Large Area Infrared transmitter, which we distributed for Williams Sound. Because of my familiarity with their technology, in 1998, I became a Williams Sound independent sales consultant, based in Spain until, 2004. Then, I was hired by Williams Sound as the International Sales Director and served in that role until 2008, when I was named Vice President Domestic and International sales."

Doreen Meets Mike

That's when I met Mike Braun. He was at a networking group meeting, which the President of the company attended. Our President told me that Mike was developing a company to train Sales Leaders, primarily because great sales people often end up as Sales Leaders but have no leadership experience. He asked me if I'd be interested in working with Mike and I jumped at the chance, eager to improve my opportunities as a Sales Leader."

"Mike was comfortable to work with, encouraging, straight forward, and clearly knowledgeable in what he was doing. His initial visit was simply to learn about Williams Sound, not only to become familiar with the business, but also to get to know me. He asked lots of questions."

"As part of this process, we determined the need to bring on two new sales people who would work in the field with the Manufacturers Reps and grow the US business."

Making a Plan

"After getting acquainted, we discussed what my anxieties were, and where I felt I needed assistance: too many meetings, missing one-on-one time with my team, and starting projects and not completing them due to having too many commitments."

"Mike helped me look carefully at how I was managing my team, and to consider if they 'were the right people'. He asked for permission to interview my team, which consisted of 16 people, including customer service. He also advised me that he would not share the results, but rather use the input to help guide my growth."

"Mike determined during the interviews that I had:

- No time to focus on my team's growth
- Too many meetings
- Team members as islands unto themselves with little collaboration
- Team members grasping at all sales opportunities, with no focus
- A travel schedule that created inconsistencies in leadership
- Team members who never knew how they were doing, against plan!"

Keeping the Existing Team

“My sales team was basically a group of customer service people who had come up through the ranks. Most of them had no true sales expertise. Mike recommended some changes, but I was reluctant to lose any of them, so we worked with whom I had. The company culture was, and still is, nurturing, family-oriented and very much managed with the employees as a major consideration.”

Tracking Activity

“With Mike, I created a Sales Management system which helped to hold my team accountable to me, and me to them. They were each given a program to help them build relationships with their customers, and to help them keep accurate records of sales against monthly goal, and annual goal. It called out activities to be tracked, such as customer touches, emails, phone calls, visits, trainings and other specific marketing activities.”

“I wholeheartedly consider that Pivotal pointed us in the right direction”

Not Popular, or Easy

“Initially, it was not a popular system as it required a new commitment and regular reference to the documents. With consistent management of the team, however, they came to depend upon it, enjoy it, and use it effectively.”

“The changes that Mike suggested weren’t easy, and it was very important that I took it seriously. I worked hard with Mike and paid close attention to his coaching. Mike always left me with something to discover and learn about myself, or to introduce to my team in between his visits.”

No More Mother Hen!

“I had learned that I didn’t have to be a Mother Hen(!) and that the team, myself included, were all accountable to one another. I realized that I could manage the team, and gain their respect through consistency, knowledge, information sharing, and good management.”

“Here are the Good Management activities that were executed as part of the plan:

- Sales meetings every morning. What you did yesterday, what was the result of your actions, what are your next steps, what are your plans for today? Sharing this in a team setting created accountability, as we all had to discuss it again the next day!
- One-on-one coaching sessions, were now fixed, no excuses from me or them, even if I were travelling - the times were fixed.
- Weekly 5’s – 5 points from each team member provided on Fridays, detailing the notable accomplishments or events and successes. This was shared throughout the company.
- Goal setting for their accounts, creating specific agendas for monthly telephone calls to our international partners. We began carefully managing these sales opportunities.”

Results/No Results/Results

“Year-over-Year, we were seeing 2 – 3% growth, which, at the time, we were happy with. Year 2 of working with Pivotal, we were up 6% , year 3, 7% and it continued that way until a new VP came in and stopped using the sales management system, then sales fell dramatically.”

“We have, once again, put the majority of the Pivotal program back in place and are seeing significant revenue resurgence since my return 18 months ago to lead the International team. I wholeheartedly consider that Pivotal pointed us in the right direction.”

WILLIAMS SOUND - PAUL INGEBRIGTSEN

Paul Ingebrigtsen is President and CEO of Williams Sound, a global designer and manufacturer of wireless communication technology. He has been with Williams Sound since 1979 and started his career as an assembly worker.

When Paul Met Mike

"I became acquainted with Pivotal Advisors at a networking group meeting. Mike Braun had joined the group shortly after starting Pivotal Advisors. What caught my attention was Mike's reason for starting his company. He said, 'There are lots of people who do sales training. However, a different skill set is required to be a Sales Leader, and not a lot of those resources are available. Mike saw this opportunity to help people become better sales leaders and started Pivotal Advisors with his brother Gary.'"

"Pivotal Advisors helped us look at our existing team and make sure that we had the right players in right places."

Talk To The Wife

"After meeting Mike, I went home and talked to my wife, Doreen, who was the Sales Leader at Williams Sound. I told her about Pivotal Advisors and their thoughts on training Sales Leaders to be more effective. She said, 'I'm interested in being a better leader, let's connect with Mike and see where it goes.'"

Belief In Personal Development

"We have a perfect environment in which to develop ourselves. From the time Jerry Williams founded our company, we've had a belief and a willingness to invest in ongoing training for our employees, especially our Executive Team. We've always encouraged our key people to participate in networking groups, or work with consultants and personal coaches."

A Surprisingly Good Fit

"Working with Pivotal Advisors turned out to be a good fit for Doreen and the business. It was also a pleasant surprise for Mike because his biggest challenge is a resistant Sales Leader. Often, the CEO invites Mike in to get help on the sales side of the house. Then, when interviewing the Sales Leader, he usually hears, 'I've got this and don't need you. When my reps don't make their numbers, I get after them.' In Williams Sound, Pivotal Advisors found a willing client that recognized the need for their assistance."

Challenge #1

"Doreen's main challenge was that our sales team consisted of customer service reps who had transitioned to salespeople. Their skills were reactive, not proactive – wait for a phone call or an email and act. Once something happened, things went well. What was missing was sales outreach – what are we doing to find business?"

Solution #1

"Pivotal Advisors helped us look at our existing team and make sure that we had the right players in right places. They put a sales system in place so that we could track the activities that cause success in our environment – how to proactively make things happen."

Accountability

“Accountability contributes to success and helped us make our team proactive. We started asking the question, ‘What are you going to do?’ instead of having them show up and see what happens. Pivotal Advisors had us limit our tracking to the five most important activities: Make V phone calls, send W emails, do X demonstrations; present Y proposals, and close Z sales. We began group meetings, where the reps share their activity, sales goals, and report their results. We also started holding one-on-one meetings, reviewed the same information and made mid-course corrections, as needed.”

Pushback – No Pushback

“Initially, we got a little pushback regarding the group meetings. People wanted to hide and not admit that they didn’t do what they had committed to do. It’s all about Accountability.”

“After a while, the push-back went away and people started hitting their activity numbers and revenue goals. Accountability is a big, loaded word that has many negative connotations. Big Brother, Punishment. A few years ago, I heard a speaker talk about Accountability and what it really is: “Nothing more than doing what you’ve said you were going to do.” That is such a simple observation that takes the emotion out of it.

Results

“It was 3 – 4 months before we started to see the cumulative effect of changing the sales system, process, and behaviors. The desired result began to occur - more revenue growth.”

Oops!

“I always say, ‘The proof is in the pudding.’ Although I hate to admit this, we took some time off from the Pivotal system when Doreen retired and we brought in a new sales leader. Everything went along well for almost nine months, which was mostly due to inertia. We gradually stopped using the sales system, didn’t have our group meetings and the one-on-ones. We thought, ‘our sales people are professionals and don’t need babysitting.’ Revenue growth slowed, stopped, and then reversed.”

“When we followed the Pivotal System, we grew. When we didn’t, we were stagnant.”

Back On Track

“We had a chance to re-boot when the new sales leader left. We asked Doreen to come out of retirement to steer the sales ship while we searched for a new sales leader. Doreen re-engaged with Pivotal Advisors and, put our best practices back in place, and we fortunately found a new sales leader, who ‘drank the Kool-Aid’ and was onboard with the Pivotal Advisors’ processes. We then decided to split our domestic and international sales responsibilities between Doreen and the new guy. No retirement for her.”

“With two effective leaders believing in and following the sales process, we were able to divide and conquer our sales opportunities. Since then, we’ve had two consecutive years of double-digit sales growth.”

The Bottom Line

“When we followed the Pivotal System, we grew. When we didn’t, we were stagnant. For me, this proves that Pivotal Advisors knows what they are doing and that their tools and processes work.”