

HOW A DISTRIBUTED SALES TEAM TRIPLED THEIR ANNUAL SALES THROUGH WORKFLOW OPTIMIZATION AND INCLUSIVE CUSTOMER EXPERIENCE

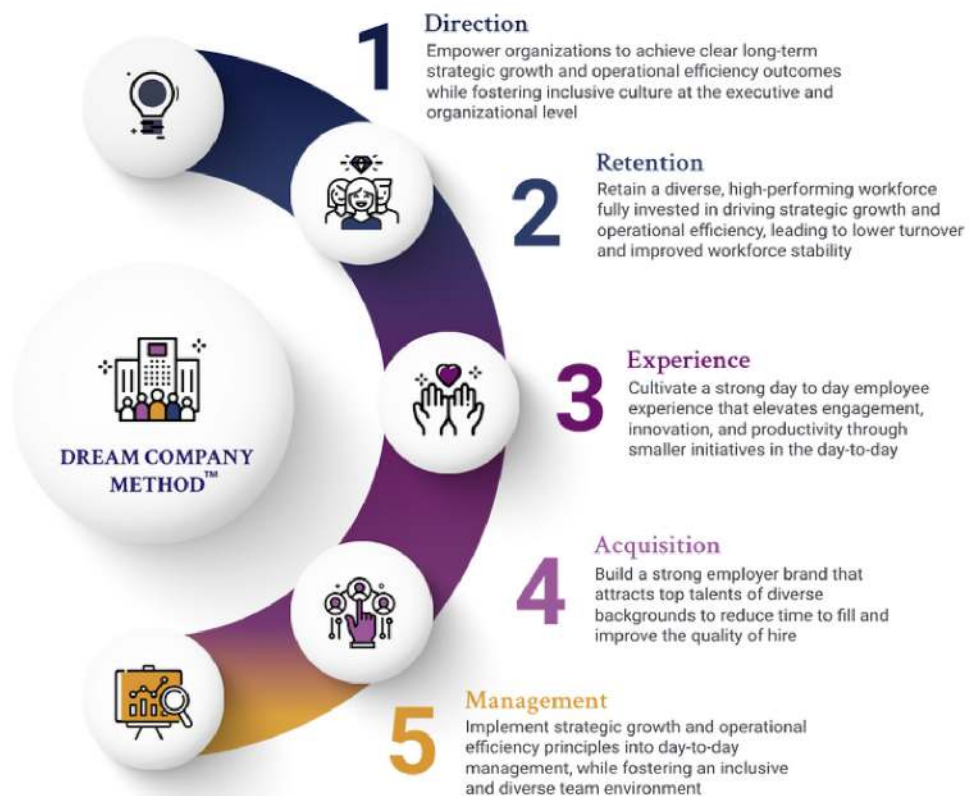
- Industry: Health
- Function: Sales
- Company Size: 50-250 employees
- Location: United States

The sales team of this organization reached out to us with three primary needs. First, they sought support in meeting sales quotas while their team leader was on sick leave. Second, they expressed concerns about their current manual processes, which were hindering their sales focus. Lastly, they aimed to enhance their team's efficiency for an improved customer experience.

APPROACH

In this strategic advisory and hands-on implementation project, we honed in on two key pillars of our DREAM™ company framework: experience and management.

- Experience: We pinpointed opportunities for process automation, streamlining manual tasks to heighten the sales experience for customers. We then constructed and integrated these process automations.
- Management: Collaborating closely with the sales team, we optimized their task allocation, directing their efforts toward high-impact tasks during their team leader's absence.



PROCESS

Our journey began with a process audit of the team's current sales process, workflows historical performance, and existing task list. This analysis illuminated high-impact tasks and any inefficiencies.

By identifying automation-friendly areas, we decided to build out a chatbot sequence. This encompassed technical setup, designing the conversation flow, identifying the correct no-code platform, creating training documentations, as well as setting up additional marketing automations.

We also identified strategic enhancements within the realm of customer experience. These adjustments employed DE&I principles such as inclusive communication practices, identifying any barriers that can hamper customer experience such as timezone, language, etc.

RESULTS

1. **Outperforming Expectations:** The team not only met but exceeded the sales goal for the subsequent month. They tripled the team's sales compared to the previous year, making a significant contribution to the company's bottom line.
2. **Elevating Customer Experience:** We drastically reduced customer wait times, doing away with the need for extended delays, especially for customers situated in different time zones and locations. This immediate response capability translated into greater customer satisfaction and a more seamless purchasing journey.
3. **Smarter Workload Management:** Our approach to distributing tasks according to team members' strengths and skills resulted in a remarkable boost in productivity. By aligning their focus with critical tasks, the team achieved more, elevating overall performance.

NEXT STEPS

If driving strategic growth and operational efficiency while fostering a culture of inclusion is a priority for your organization, we invite you to schedule a 30 minute roadmap session with our team. During this session, we'll work collaboratively with you to:

- Evaluating your current strategic direction and growth objectives
- Identify opportunities to drive strategic growth and operational efficiency while fostering a culture of inclusion
- Co-create a tailored plan of action that aligns with your objectives and values

If there's a mutual fit, we'll also assess whether our solutions are the right fit in helping you achieve your objectives. As a trusted strategic partner, we'll only recommend solutions that creates win-win outcomes for all parties involved.

SCHEDULE YOUR ROADMAP SESSION