

# Experience Case | Business-To-Business (B2B) Digital Marketing Services



*Developing* Business Development:  
Opening Up Sales Team Agility



## Developing Business Development:

### Opening Up Sales Team Agility in Business-to-Business (B2B) Marketing Services

#### The Present Becomes The Past...Faster Than Planned

Transitioning to new markets is always challenging. The pain is even more acute when a high-margin product is quickly becoming obsolete, and the team is still finding their way, trying to take care of clients with newly-developed offerings while the company repositions itself. One noteworthy past experience in this vein involved a media sales organization focused on selling digital media services (search engine optimization services, local web advertisements, small business contact management programs) and print offerings (local mail campaigns, business ad books, and customized signage) to small businesses across the U.S.

Management had grown up in the print advertising days. They needed to quickly transition product offerings from print to digital while developing a leaner sales process (amid fierce competition from new technology start-ups and global tech-enabled companies with deeper pockets). Against a backdrop of proliferating digital channels for small business marketing & branding campaigns, the rapid decline of higher-margin print product offerings, and the relentless pressure of competitors taking client marketing budget dollars, this firm needed to reinvent itself quickly.

Focused entirely on local and regional markets, the team needed to find a better way to position its newer digital marketing products & services with current small business clients. However, their promising new offerings had a more complex value proposition to convey and were proving to be more challenging to articulate to clients. The new offerings were universally understood to be the future of the firm — but initially provided lower margins and did not have the market awareness garnered by other competing local search services from larger global media firms. While bolstering their digital products & services offerings to offset rapidly evaporating print revenue, the team needed to deploy their Inside Sales & Marketing talent much more efficiently than years past as they battled to retain their existing revenue base while acquiring new clients.

#### B2B Firm's History

Initially a carve-out from a print-oriented advertising company, the parent media company grew through a series of mergers & acquisitions. While the firm had other high-priority initiatives underway outside our scope (like new digital product development, portfolio products & services paring, and operations cost cutting), our engagement focused on optimizing their Inside Sales revenue component by embedding a leaner sales process, redirecting non-sales-related workflow, providing more timely performance indicators, and sharpening presentations & demonstrations with Digital Media Associate (DMA) best practices across the board. The first order of business involved communicating to the entire Sales Center the rationale behind the pending revamping, reasons why the transformation start time was so urgent, and how the team-at-large could get involved.

#### B2B MARKETING SERVICES

##### Experience Case Synopsis:

- Building up business development infrastructure, redesigning cascading performance data hierarchy, implementing a leaner sales process, and setting up a remote workforce in digital marketing services

##### Firm Profile:

- **\$150 Million** revenue media sales division with 23 U.S. local markets territories
- **275-person** talent base including 220 Digital Media Associates (DMAs), 20 Supervisors, 5 Managers, and 1 Vice President

##### Financial Results:

- **15%** increase in revenue per days worked

##### Operational Results:

- **32%** increase in digital services demonstrations to prospective clients
- **20%** decrease in non-sales activities for DMAs
- **50%** reduction in sales dashboard turn-around time
- **23%** improvement in Sales Supervisor engagement support with team

##### Organizational Benefits:

- Lean selling process based on top-performer DMA Archetype and proven collective selling wisdom
- Customized sales dashboard with cascading key performance indicators from Sales Vice President to all DMAs
- Improved client relationship management (CRM) data integrity, utilization, and operational performance reporting
- Upgraded prospecting processes, research tools, and competitive analysis reporting
- Cohesive, tech-enabled remote workforce management program



Some additional color commentary: this team was centrally located under one roof, however, they were transitioning to remote work days in addition to their current office environment. From a sales territory perspective, the DMA's target market was comprised of small business owners (averaging less than \$10 million in annual revenues) across various industries located in 23 United States local territories. When their prospects grew beyond local market parameters, the firm had another team visiting with the business owners on-premise.

Prospecting lists were generated by inbound and outbound lead sources including: website inquiries, social media networks, prior products & services purchases, existing client referrals, new business licenses lists, and researched lists from a small in-house Marketing Research team. Leads were vetted with Management and then distributed across DMA Teams based on business location, industry specialization, and products & services requests. DMAs focused on generating initial interest through online products & services demonstrations. Demos were generated and scheduled through cold phone call appointment setting, targeted email campaigns, and via company website.

## Key Challenges

**Fierce Competition** — Their client base had numerous advertising options to choose from on a local and national level. Risking understatement, the firm was facing immense competition for advertising dollars across a plethora of technology platforms and substitute products.

**EBITDA Trending Downward** —The firm had several promising digital offerings but struggled to get this suite of options out in front of clients fast enough to offset declining margins as they repositioned. They needed to get clients signed up on their latest digital offerings efficiently and effectively to offset declining print revenues — but also had to worry about getting more productivity out of the Sales Team (targeting EBITDA by increasing revenue and cutting selling expenses).

**Messy Operational Metrics** —The DMA Team was working with a hodgepodge of reporting inherited over the years and serving very different audiences. The Vice President relied on monthly financial reporting as guidance for operational performance. However, these reports were cumbersome to access, not timely enough to see the week's operational performance, and comprised of *lagging* indicators given the financial orientation of the reports. Each Manager had their *own versions* of reports to keep the team on track. None of these ad-hoc reports rolled up cleanly or were consistently accessible.

**Outmoded Business Processes** —The firm was still holding onto processes developed in the days when print advertising comprised the majority of their revenue. Fortunately, their digital products did not have the same burdensome requirements (such as client proofs, layout limitations, static ad components, and publishing turnaround times) that their print products had; yet, they were managing the business, and key processes, with the same inherited tools and procedures.

**Misguided Management** — Management and Supervisors were promoted based on prior individual selling capabilities rather than on their current ability to encourage and support a team. (This tends to be a common theme irrespective of the industry.) Both clients and DMAs needed more support, more education, and more patience from Managers and Supervisors. Yet, most managed by reinforcing versions of their own selling style "back in the day" rather than finding alternate ways using analytics to accentuate the strengths of the team at present.



### Catalyft Team's Past Experiences:

**50+**  
B2B  
Engagements  
(Total)

**7**  
B2B Selling Processes De-  
signed, Developed, and  
Implemented  
(Total)

**50%**  
Of B2B Engagements Incorpor-  
ated A Remote Workforce  
(Historical Avg.)

**\$125 Million**  
Company's Revenue Size  
(Historical Avg.)

**5.2 to 1**  
B2B  
Return On Investment  
(Historical Avg.)



**Insufficient Training** — The firm had a good training team already in-house with strong training content built around product features. However, they were missing the boat on combining existing product training with more effective sales process training—aligned with all the technology tools available to DMAs for business development campaigns.

**Increasingly Remote Workforce** — Technology advances allowed DMAs to work from home part-time rather than being in the office all week. This alternate work environment was very well-received by the DMAs but the Managers and Supervisors were struggling to make this “hybrid” style of work, well, work. Management was still trying to figure out how to keep motivation built up, team cohesion intact, and performance visibility from sliding when part of the team was at working at home throughout the week.

## Collaborating On Leaner Sales Processes, Tools, and Training

While the New Product Development Team battled to keep their local search offerings relevant, effective, and client-friendly, we helped Management build up the business development infrastructure, day-to-day operational efficiencies, timely operational performance visibility, and tech-supported team training. Several new capabilities included:

**Comprehensive Dashboard Reporting** — Our first order of business entailed getting the data hierarchy structured with timely operating metrics rolling up on a daily basis (from DMAs to Supervisors to Managers to the Vice President). We built a metrics profile for each DMA involving daily prospecting metrics (such as outbound marketing instances, contacts per demo scheduled, demo conversion rates) monthly metrics (such as category penetration rates and premium product bundling successes) and long-term DMA track records (revenue per days worked, customer retention rates, and upselling success rates).

Each DMA now had a personal performance metrics profile based on his or her own specific activities and marketing campaigns. They could clearly see what activities were translating into revenue. With the roll-up feature of the DMA dashboards, Supervisors and Managers could be more precise in their approach to supporting their teams. With the numbers being the champion for success (or the bearer of bad news), performance plans became more objective rather than always having a sense of personal attack tainting the Supervisor-DMA conversation.

**Supervisor and Management Training** — Sustaining new tools, leaner processes, and upgraded procedures fell squarely on the shoulders of Supervisors and Managers. In order for this Sales Leadership Team to harness the power of changes made and get a clearer sense of how this helps them succeed in supporting the DMAs, they needed more training. Sales Leadership fundamentally understood most of the changes because they were actively involved with design, development, and implementation of all new tools, processes, and procedures. Furthermore, we encouraged a heavier reliance on performance data to help Managers and Supervisors customize their support to specific DMA needs rather than treating each person with the usual broad (superficial) approach to supporting performance. The team also received technical training on the Client Relationship Management (CRM) software, outbound call & email tools, and web meeting software.

**Internal Workflow Redesign and Core Selling Process Model** — Part of the challenge to generating additional revenue involved making sure



## Partnering With B2B Services



### Key Challenges:

- ⇒ Fiercely Competitive Markets
- ⇒ Evolving Business Models
- ⇒ Fluid Talent Pools
- ⇒ Numerous Productivity Barriers
- ⇒ Waxing and Waning Employee Engagement & Motivation
- ⇒ Complex Technology Integrations
- ⇒ Data Analytics and Visualization Timeliness and Usability
- ⇒ Fragmented Sales Processes
- ⇒ Remote Workforce Incorporation
- ⇒ Leveraging Firm's Collective Knowledge and Wisdom
- ⇒ Continuous Improvement Cultivation



DMAs were using their time wisely on prospecting and client interaction activities rather than getting bogged down with large swaths of research time, administrative requirements, and unnecessary meetings. To free up more selling time, we collaborated on moving some prospecting research activities from individual DMAs to a small, in-house Marketing Research Team specializing in vetting inbound online leads while finding and qualifying leads (as much as can be done from the outside), then, allocating the leads across DMA Teams based on geography, sector specialization, anticipated demonstration complexity, and product application.

The restructured Marketing Research Team also became heavily involved with analyzing client experience data and building competitive intelligence on competing products. Centralizing lead qualification reduced redundant activities amongst the Sales Team, ensured leads were being followed up on quickly, and freed up time DMAs historically spent combing through lead sources. Furthermore, this also balanced out the number of prospects any given DMA needed to contact.

With internal workflow redesign, we shifted non-selling activities over to parts of the firm with excess capacity and the skill sets to take on the additional workload (mainly Marketing Research and Sales Support). This redirection of workflow helped the vast majority of DMAs focus on increasing client interaction time and sharpening their selling approach by removing some of their prior time constraints (like reporting data entry, most of the lead generation research, and redundant review meetings). Only so many hours in the day...

While the DMAs had several vibrant in-house resources to support them, they did not have a crisp and lean business development process established. To our surprise, the team did not really even share best practices amongst the Supervisor-led teams with any consistency or intellectual rigor. When we looked into DMA sales effectiveness more closely, they were in the vicinity of upholding the pareto principle – with our sales effectiveness profile coming in at 74% of sales being generated by 20% of the DMA team. Next, we analyzed the activities and collective wisdom of the top-performing 20% of DMAs. We needed to understand:

*What are some consistent activities top DMAs rely on to drive results? How do they prioritize activities? What are the approaches and key phrases used when interacting with potential clients? How do they customize their presentation to perceived needs? What is their frequency of post-presentation follow-up? How do they work with Sales Support to get the contract initiated? How do they keep up with their clients after Account Management has taken over the day-to-day relationship responsibilities? What motivates them to come to work? How do they leverage the expertise of their Supervisors and Managers to advance the sale?*

Answers to these questions became a DMA Archetype we used to restructure the sales process, allow the 80% majority to learn about their peers' sales habits, and benefit the Sales Center overall by shifting the 80% majority up a gear or two. With a high-performing DMA Archetype framed, we then mapped out the sales process across key relationship development points – from lead generation to contact management to presentations & demonstrations to contract processing. Then, we created baselines for the average number of days top DMAs spent moving client relationships from lead to contact, from initial contact to product presentation, from product presentation to decision, and from "yes" decisions to contract execution (with help from the Sales Support Team).



## Partnering With B2B Services

### Team Performance Enablers:

- ⇒ Agile Selling Process Model
- ⇒ Top Seller Archetypes
- ⇒ Internal Workflow Redesign
- ⇒ Comprehensive Sales Dashboards
- ⇒ Sales Supervisor and Management Training
- ⇒ Integrated Market Research Team
- ⇒ Omnichannel Customer Engagement Options
- ⇒ Value Proposition Testing
- ⇒ Remote Workforce Support
- ⇒ Digital Communication
- ⇒ Customer Referral Program
- ⇒ Personalized Demonstrations



The sales funnel timelines of top-performers were eye-opening: this top 20% spent less time on administrative activities, more time on generating client referrals, and were much more aggressive at following up with prospective clients. Yet, they also had a strong intuitive sense of where to draw the line between nurturing a prospect over time and becoming a prisoner of hope for a sale that never comes.

While communication styles varied even amongst the top 20%, the most successful DMAs prided themselves on being *educators* of new products and rigorously focused on ways to help their clients' own business rather than trying to "talk" a client into a new product or befuddle them with technological prowess. (This Sales-Person-As-Educator Archetype shows up regularly across industries, not just in Media & Advertising.) We restructured the presentation & demonstration model to reflect a *learning* experience rather than a series of canned questions leading to a predictably boring closing. Furthermore, we helped open up the conversation to embrace more prospect-defined options rather than going into the presentation with assumptions. Restructuring the presentation framework to reflect the top 20% DMA Archetype provided clarity to the other DMAs to know what outcome they needed to achieve with most client interactions, to actively seek out prospective clients' feedback during the needs analysis, and to embrace their own conversation styles while following the DMA Archetype. (Some DMAs referred to this as finding a delicate balance.)

With new presentations more attuned to clients' businesses, and with DMAs more comfortable in conversations using the demonstration technology, good things happened. DMA anxiety decreased, presentation quality improved, service offerings were better customized to specific client needs, and revenue per work day trends increased.

**Remote Workforce Model** —The Team's client interaction avenues (mainly calls, emails, web meetings) made this an excellent environment to provide an opportunity for DMAs to work from home. Communication could take place anywhere that aligned with territory time zones and key technology systems (like their CRM, web meeting software, work day time system, and contract initiation software) could all be accessed anywhere with a strong internet connection. We collaborated with Management to structure training sessions, performance reviews, update meetings, and daily support huddles with both remote workforce and officemates in mind. Furthermore, the new performance reporting was rolled up with a cloud-based data visualization application; so, there was no getting away from the numbers (even in the comfort of your living room with a cat on your lap). Managers and Supervisors needed to make sure they were providing support to their entire team — irrespective of where they happened to be working that day. Without the ability to read the body language of DMAs, Supervisors and Managers needed to confirm understanding using their operational performance data and web meeting interactivity features. Crucially, they also needed to guard against their remote DMA workforce feeling isolated from the rest of the team. In the end, it's the sales performance that mattered (whether in slippers or in dress shoes).

## The Team's Collective Results

As a more agile Sales Team working with leaner sales processes and operational performance visibility, DMA non-selling activities decreased by 20%, presentations & demonstrations increased by 32%, and revenue per days worked increased by 15%.



### Our Way of Collaborating:

#### Identify



2-4 meetings at no cost

- Discussion of issues
- Alignment around probable causes
- Framing of analysis scope

#### Qualify



3-6 weeks at cost

- Qualify opportunities with Trapped Value Analysis (TVA)
- Quantify anticipated results
- Initial engagement design
- Key meetings: Launch, Opportunity Review, Solution Review, and Final Framing of analysis scope

#### Modify



4-8 months

- Final engagement design
- Execution of engagement design
- Realization & measurement of results
- Ownership & sustainability

### Office Locations:

NYC

One World Trade Center  
Suite 8500  
New York, NY 10007  
212 220 3897

CHI

444 West Lake Street  
Suite 1700  
Chicago, IL 60606  
312 260 9907

MIA

200 South Biscayne Blvd  
Suite 2790  
Miami, FL 33131  
305 925 8112

SFO

101 California Street  
Suite 2710  
San Francisco, CA 94111  
415 636 7999

TOR

20 Bay Street  
11th Floor  
Toronto, ON M5J 2N8  
647 725 9662



# Our Services



## Enterprise Excellence

- Integrated Operational Performance
- Sales & Marketing
- Human Capital
- Margin Growth & Cash
- Information Technology Transformation



## Operational Turnaround

- Cash Conservation & Liquidity Generation
- Contingency Planning
- Development, Review, & Implementation of Cost Reduction Initiatives
- Interim & Crisis Management
- Operational Reorganization



## Organizational Analysis

- Mergers & Acquisitions
- Organizational Readiness Appraisal
- Trapped Value Analysis & Resolution Approach
- Our Commitment to Community — Pro Bono Advisory Services for Small Businesses & Education



# Key Statistics

Clients' Historical Return On Investment (avg.)  
**4.8 to 1**

Team's Collective Career Engagements (total)  
**1,496**

Specialists: Years In Consulting (avg.)  
**21**

Subject Matter Expertise (SME) Network (total)  
**500+**

Team's Historical C-Suite Executives Roles (total)  
**39**

Team's Career Training Sessions Delivered (total)  
**4,935**

Supply Chain Cost Savings (avg.)  
**19%**

Working Capital Unlocked For Reinvestment (avg.)  
**21%**

Tech-Enabled Productivity Increases (avg.)  
**27%**