



## Implementing a new sales process at Xansa Case study

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### Abstract

*An outsourcing company identified the need to implement a single, consistent sales process across the group. In addition to short-term productivity improvements they saw successful deployment as key to future growth.*

*Working with ChangeBEAT, Xansa executives consulted key opinion formers in the organisation and reviewed their own best practice. This was combined with ChangeBEAT's ExecKIT, to produce a clearly defined process which was rolled out.*

*As Mike Martin, the programme manager, subsequently reported, "There is no question that the programme has enabled continuing revenue growth and profit improvements and paid back our investment in months."*

## Introduction

Xansa (before its acquisition by Steria in 2007) was well known for its applications management and outsourcing expertise. The Group operated in the UK, Europe, India and the USA.

Xansa grew partly through organic growth and partly through acquisition and was one of the first companies to recognise and act on the off-shoring opportunity. Between 1997 and 2001 it acquired IIS, an Indian computer services company; OCR, a London based business consulting company; and Druid, an IT consultancy.

## The opportunity

Xansa's senior management identified the need to facilitate further growth by implementing a "best practice" sales process across the group. The identified business benefits were

- a consistent high-level "value message" to the market, exploiting the company's increased delivery capability
- better qualification, leading to less time wasted on unproductive or non-strategic bids
- increased win rate of bids engaged
- better deployment of the available selling resource
- better cross-company account management
- increased cross-selling across the different businesses within the Group
- improved targeting of new accounts
- shorter "dead time" before new sales professionals became productive
- more systematic risk assessment and planning.

A consistent process was seen as a prerequisite to controlled growth, and a key enabler to accurate sales forecasting.

The business case showed hard benefits running into millions of pounds from improved sales and delivery productivity and improved cross-Group selling.

The anticipated soft benefits included improvement of morale from reduced "fire fighting" and increased customer satisfaction.

Recovery of the investment required to set up the new process was expected in just a few months.



## The challenge

Working with *ChangeBEAT*, Xansa identified the need to do three things in parallel to achieve enduring improvement in their performance during the sales cycle

- Define a simple, pragmatic but rigorous sales process
- Develop a sales support system
- Provide training to the selling team in the context of the new process and support system

## The process

In designing the process it was recognised that it had to be highly supportive and incontrovertibly beneficial to the sales team, while bringing in an appropriate level of consistency, quality and scalability. Any hint of unnecessary bureaucracy would make the process impossible to implement.

The necessary flexibility was achieved by basing the process on four formal management control points or "gateways", when a mandatory review is required before the next phase of the sales process can be started. The necessary level of "sign-off" for a review was formalised with authority being delegated as much as possible. The process enabled simple bids to "fast track" through the gateways, but ensured more complex bids were reviewed to a necessary level of detail.

To define and document the process, Xansa's existing material was reviewed and where possible retained. Where there was nothing, or the Xansa material could be enhanced, analytical tools and supporting documentation were provided from *ExecKIT*, *ChangeBEAT*'s existing library of industry best practice. An end-to-end process relevant to Xansa's business was therefore defined.

The sales forecasting process was related to progress through the "gateways". Standard sales forecasting definitions produced consistency and accuracy instead of subjective inconsistency.

## The support system

The next phase in the project was to develop the support system. Xansa's existing business process navigator, Meridian, was extended to include the new sales process.

The system consisted of

- best practice guides for the key elements of the process
- process guides (how to do it) detailing each stage



- productivity tools and templates
- knowledge bases providing additional information.

Additional functions were incorporated such as a contact management and bid tracking system and an electronic librarian.

### The training

Throughout the project Xansa recognised the need for change management, of which the training formed a part. To pave the way they performed a consultation exercise with influential opinion formers to gain consensus on decisions.

In parallel the new material was piloted with the users to identify improvements. Once the system was in place, Xansa ran a series of one-day training workshops to introduce the new system.

In total it took three months to roll out the new sales process to over one hundred and fifty sales and sales support professionals.

### The results

The new sales process was a substantial success. Following a post-implementation audit, Mike Martin (the programme manager) reported:

“The new sales process has brought visibility, consistency, control, reduced risk, better prioritisation and appropriate resourcing. There is no question that it has enabled continuing revenue growth and profit improvements and paid back our investment in months.

“*ChangeBEAT* were pragmatic, effective and goal-oriented throughout the project. The impetus they provided enabled us to move with speed and clarity of purpose.

“The *ExecKIT* blueprint saved us substantial time enabling us to benchmark and improve our own process elements. *ChangeBEAT* was key to our success.”



*ChangeBEAT defines, develops and executes change programmes that help achieve enduring business benefit rapidly and reliably. Our people have practical field experience, and are equipped with WingBEAT, our proven change methodology, and our extensive tools. We are professional, pragmatic and action oriented.*

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