

Paul Charles & Associates

Sales Management Consultants

- SALES MANAGEMENT PROGRAMS
- SALES TRAINING & COACHING
- MARKETING & COMMUNICATION

“Helping people sell more and communicate better”

Case Study: Business Development Training

Summary: Customized solution for regional two-hundred person accounting firm that was striving to grow a branch facility in New Hampshire.

The client experienced fifty-percent growth the year following our program.

A successful professional organization with a sixty-year New England presence, our prospective client was looking for a more effective way to grow their New Hampshire branch office. The senior partners were particularly interested in improving the mid-management team’s ability to develop new business while continuing to retain and grow the scope of current client relationships. As professional service providers, they were not looking to turn their management staff into a sales force. Therefore, the objective was to help the team learn how to make things happen in a style that was unobtrusive, consultative and client-centric.

During the program’s assessment phase we identified opportunities for improvement in the group’s spontaneous approach to business development and meeting management, their derivative methodology for responding to requests-for-proposals (RFP’s) and their reactive business networking style. Four key areas of focus were determined:

- Strategic communication
- Business networking
- Establishing value
- A systematized business development plan

During the implementation phase, participants reported significant improvements relative to the productivity associated with business networking, client meetings, the RFP process and presentations. The team’s new perspectives on business communication, planning techniques and meeting protocols led to shortened project completion cycles, more engaged clients and more frequent referrals. They also found the systematic approach to business development enabled the firm to strategically identify action steps, create schedules in advance and allocate appropriate resources to the process. The associated metrics and on-going organizational plan brought-about heightened levels of accountability as well. On a more individual basis, team members were able to leverage personal strengths and approach networking and business development opportunities with more confidence and structure, with a heightened awareness of goals and with a straightforward plan for identifying and scheduling consequential next steps.

This combination resulted in a more empowered group that was able to increase revenue by over fifty-percent in the twelve-month period following the training initiative. As a testimonial to their satisfaction, the firm engaged us to develop and present a similar program for their corporate headquarter location.