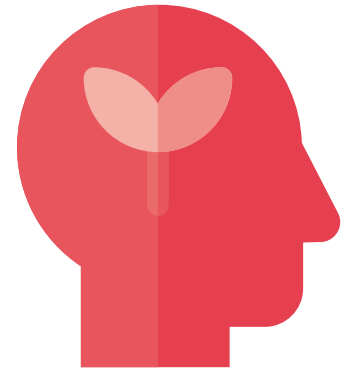


Unlocking strategic transformation through culture change



Client need

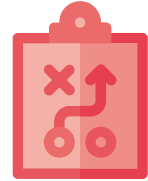
An enterprise software company made a large-scale strategic shift to focus on cloud-based offerings. The leadership team, though aligned on the goal, struggled to engage key stakeholders, and implement the change efficiently. A lack of clarity and process blurred the overall vision and discouraged employees from authoring a way forward with the new business plan. With huge upfront costs for the company, making this shift successfully and swiftly was important to the leadership team to realize the value of their investment. Moreover, the time to profitability changed dramatically, demanding more from the sales team. Without alignment on process and customer retention, the change to cloud-based services wouldn't prove profitable.

After several failed attempts to drive change at scale by outsourcing to other partners, the sales operations organization decided to lead the work internally and engaged BTS to provide an outside perspective as a "guide alongside" during their transformation. The goal was to provide the wider organization – their key internal stakeholders – with more timely and accurate data to better support engagement with customers while creating a scalable culture of continuous learning and innovation across the sales operations organization. The leadership team wanted this organization to feel true ownership and pride for the transformation and looked at this effort as a chance to rebuild the confidence that was lost during prior failed attempts.

Solution

Over the course of two years, BTS introduced approaches to boost morale and engagement within the sales operations team and invited them in to co-create the future of the organization. We challenged team members to shift the current way they were thinking toward one that required them to step into the shoes of the sellers they supported in order to solve problems in new ways. By reflecting on their stakeholders' needs and overall user experience, and practicing simple, yet powerful, approaches to problem solving, sales operations team members implemented critical mindset shifts needed to make the change stick.

A few of these powerful approaches and shifts included:



- 1. Building deep user empathy to support the shift toward solving challenges with the "customer's" end in mind**

Team members spent more time proactively defining the problems to be solved for specific sellers and sales managers rather than just responding to requests from leadership. They considered who these sellers and sales managers are, the outcomes that matter to them, and why they are so important. These questions then became commonplace in team conversations as they sought to articulate and focus on identifying the right problems to solve in order to move change forward.





2. Challenging conventional wisdom to focus on possibilities for solutions rather than advocating for which solution is “right” or “wrong” before getting data and insights

BTS facilitation helped guide leaders to build agreement and communicate with team members around guidelines for ideation implementation and success. A critical focus question was “What would need to be true for this idea to work?” Leaders asked all sales operations team members to address this question when presenting possible solutions, debating the path forward, and working with cross-functional team members. This disciplined focus tapped into opportunities for many voices to be heard and set the expectation for all team members to think differently about what is possible.

3. Using creativity and diversity of thought to shift from building a perfect plan to recognizing that there are risks that can be avoided and others that just need to be managed when they occur

BTS prompted leaders to look toward the future and imagine what might cause a particular strategy, idea, or project to fail. This helped them to better prepare and mitigate emerging risks and obstacles. By prioritizing these risks based on the level of impact that they may have and assessing the probability of them happening, team leaders were better able to determine which threats to tackle first.

As a result of this engagement, and the team’s ongoing efforts leveraging their new ways of working, the sales operations team met their targets in the first quarter of the subsequent fiscal year, removed many unnecessary steps in the process, and maximized efficiency for their sellers.

Conclusion

This journey equipped leaders to build an organizational culture of learning, innovation, and efficiency. As a result, they were able to scale their business and grow both their top and bottom lines. This shift in process and culture helped the team realize the potential profit that cloud-based transition represented for the future of the wider organization. Adding structure forged a connection between vision and execution, making the strategy tangible and actionable. Refocusing on customer needs created efficiency that earned back valuable time for sellers in the organization. In the end, solving from the perspective of sellers in service of the company's broader transformation toward a more cloud-based strategy laid a successful foundation that is leading the company to long-term growth.

"As a result of going through the experience, my team asks better questions and is much more engaged than in years past in looking at our key processes and identifying ways to innovate and improve to drive efficiencies. In fact, we recently reduced a key month-long process by seven business days which allowed the team to celebrate, take a day off, and, just as importantly, repurpose part of the saved time to deliver valuable insights to the business."