

Tech and Media Sales Operations Optimization To Drive Global Consistency

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The Situation



A Fortune 500 tech and media company was shifting to a new CRM as part

of a large, global integration. The technology transition created an opening for the company to evaluate its sales processes and align them to the business's buyer journey.

The Challenge

The company needed to obtain best practices and benchmarks across key sales operating mechanisms, such as sales policies, forecasting and business intelligence. They also desired a consistent and repeatable sales process framework for each of their unique media and technology businesses.

The Solution

To assist the client, the Alexander Group (AGI) conducted interviews and workshops to assess current state sales processes and design future state improvements. AGI developed **a media opportunity management process** to align sales activities against various customer segments and to accommodate different motions, including IO, online and programmatic.

AGI also surveyed its other clients with similar business models to capture real-world examples and success stories the client could utilize. Through this process, AGI co-created a new forecasting methodology outlining key steps including dependencies and responsible parties.

The Benefit

Since the assessments and new processes were created, the client:

- Implemented the sales process design recommendations into subscription-based lines of business
- Utilized the AGI media sales process framework as a launching point for ongoing design
- Aligned forecasting methodologies and procedures across business lines in order to create accurate quarterly forecasts.