# Strengthen post M&A sales

This checklist will help you to establish some priority actions to improve your sales post M&A. It's not an exhaustive list but will highlight how to develop your company's and team's capability. Top tips are noted with a

## 1. Clear direction, well-understood

Don't assume your team understands the direction or messaging of the combined new company. Test this by asking team members to articulate what the new company is about or by observing how they describe it in customer meetings. Supportively challenge them to articulate the value of the combined businesses. Explore their beliefs about the new business to see where you have work to do.

## 2. Is the 'What's in it for me' factor clear?

Is there a clear 'WIIFM' to sell across the whole company portfolio? Does everyone know who does what and who gets what? Is the risk and effort worth the reward? Are there consequences for not changing as well as benefits for changing?

Having clear, measurable targets or KPIs, supported by commissions, incentives or rewards is important to signalling your intent and to delivering a clear 'WIIFM' message to sales.

## 3. Clear processes to sell well

Have you mapped the customer buying journey with your internal process to map the right people, collateral and activities to the right stage? We have a template we can share with you if you want some help with this.

Do you your team actually know who the subject experts are and how to engage them at the right time? Supplying an org chart or internal directory is usually not enough. You need to have a clear process and contact methods and make personal introductions to key individuals. Are there too many sales-stalling hoops to jump through to find the right people, information, processes or pricing?

Do you have a way of tracking opportunities and sharing information across teams, even if CRMs are not yet joined up? This is important for collaboration between disparate teams.

### Want to go faster?

Contact us to request our buying journey framework template in Excel.

Request a free 5-20-5 sales hack—30 minutes to work together on your specific challenge

### Want to go even faster?

Our clients get

Tech B2B relevant templates, models and job-aids

Fast-track guidance, facilitation, coaching and training

## 4. Build an ongoing training & enablement plan—once is not enough

Analyse what training and enablement is needed. Break this down into Knowledge, Skills and Mindsets as these will need to be addressed in different ways. Build out your training and enablement plan with a clear line of sight to the behavioural, performance and business changes you want to see. We have a checklist template to help with this.

Drip feed the team with enablement activities—little and often works best, with feedback loops to assess what's working and what needs more or different attention. Involve the sales teams in creating or delivering some of these sessions—learning from each other is key to building trust and understanding.

Combine face-to-face and web training sessions, workshops, Q&A, coaching, mentoring, support guides, wikis, cheat sheets and collateral to build capability.

One important factor in enabling the sales team is clear 'how to win' case studies. These not only describe what was sold (Challenge, Solution, Outcome) but how the rep identified the opportunity and the step-by-step journey they took to beat the competition and win. These work well as a presentation or facilitated interview with opportunities for Q&A. We have a questionnaire we use for developing these case studies for our clients– we're happy to share a simplified version to help you get started.

## 5. Celebrate and reward success

Sales people are competitive. Celebrate, reward and publicise the successes—the wins, the heroes, the role models. Show the rest of the team 'what good looks like' and how to replicate success in their own accounts or territories.

## 6. Be a clear and present leader

It's a challenging time for sales leaders, particularly those on the exco team. There's a lot to do behind the scenes to integrate and operationalise the newco. But it's important to visibly support your team, to give them as much clarity as possible and to have regular touchpoints and two-way dialogue. Don't suddenly create a void—if you were a 'hands-on' leader make sure your team aren't left floundering waiting for your support or sign-off. Empower them to act without you, where you can, and make sure they have full support—direct or delegated—where you can't. This is obvious, but you may be surprised how often this is a complaint of sales teams post M&A.

### Want to go faster?

Ask for our Training needs checklist to fast-track through your needs

Request our sales case study questionnaire

### Want to go even faster?

Our blended and tailored sales enablement training programmes are proven to fast-track behaviour and mindset change.

### Embedding in Salesforce?

Through our partnership with Point N Time, we have a native Salesforce plug-in that supports strategic account development and visual stakeholder maps customised to your framework and methodology.

# Want to fast-track your growth?

## Accelerate sales growth

Our clients are all looking to grow. Their focus often spans these common goals:

- Scale growth with limited resources — nationally or internationally
- Drive strategic revenue growth into new markets, products or services
- Speed up partner enablement and alignment
- Move from transactional to value-led partnerships
- Integrate sales teams post M&A to increase cross-portfolio sales
- Develop a company-wide, repeatable sales process to connect sales execution to business strategy

## Clients

## Credentials

## How we make an impact

**PREPARE** **IMPROVE** **PERFORM**

We genuinely tailor our programmes to your goals and objectives, your customer buying journeys, your culture and your business.

We begin with the end in mind. Our shared focus is on developing the capability needed to deliver measurable outcomes against your goals.

Using our proven framework, we identify and focus on the things that will make the difference, not methodology for the sake of methodology.

We follow a tried and true approach, including practical consulting, development, training and coaching, which turns our work into your results.

We operationalise your methodology to make it 'business as usual'

FRAMEWORK

| STRUCTURE & PROCESS | METHODS & SKILLS | SYSTEMS & PLATFORMS |
|---|---|---|

PLAYBOOK

## Contact us

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