

PEOPLE.
STRONGER
TEAMS.
GREATER
POSSIBILITIES.

Sales Transformation & Performance

A PRACTICAL GUIDE FOR EXECUTIVES

Diagnose before you transform. Build the conditions for sustainable performance.

The sales operating system should enable the people doing the work — not simply measure the output of their work.

1



WHAT INDICATES THAT SALES PERFORMANCE OR EXECUTION NEEDS TO CHANGE?

Understand the trigger.

- What performance gaps or missed targets are you seeing?
- Are there recurring patterns (e.g., declining win rates, stalled deals)?
- What feedback are you hearing from customers, the market or your team?
- Are there changes in market conditions, competition or buyer behaviour?
- What are the risks of not addressing this now?

“Performance doesn’t decline by accident. It’s a signal that something needs to change.”

2



WHERE IS THE FRICTION ACTUALLY OCCURRING?

Identify the real issues.

- Are the challenges primarily people, process, systems or structure related?
- Where do you see the most inconsistency in execution?
- Are there breakdowns in communication, documentation or handoffs?
- Is the CRM, data or tooling creating friction rather than enabling the team?
- What management practices may be getting in the way?

“Friction is a symptom. Understanding where it exists is the first step toward a better operating environment.”

3



WHAT EVIDENCE SUPPORTS THE DIAGNOSIS?

Separate fact from assumption.

- What data (revenue, pipeline, conversion, forecast accuracy) tells the story?
- What qualitative feedback supports what you’re seeing?
- Where are there gaps between perception and reality?
- What assumptions are we making, and what do we still need to learn?
- How do we validate the root causes before moving to solutions?

“Good decisions are based on evidence, not assumptions.”

4



IS THE OPERATING ENVIRONMENT HELPING OR HINDERING THE PEOPLE DOING THE WORK?

Enable. Don’t just measure.

- Do your people have the tools, information and support to be successful?
- Are processes, approvals and policies helping or slowing them down?
- Do meetings, reporting and governance add value or create noise?
- Is the CRM a useful tool or an administrative burden?
- Are incentives and recognition aligned with the right behaviours?

“Your people will only perform as well as the environment you create for them.”

5



IS THE ISSUE CONTAINED WITHIN SALES — OR DOES IT CROSS ORGANIZATIONAL BOUNDARIES?

Take a holistic view.

- Are Marketing, Finance, Services, Customer Success, Sales Engineering or Product impacted by the same challenges?
- Where are handoffs breaking down or creating delays?
- Are partner or channel dynamics part of the issue?
- Does the current structure and governance enable effective collaboration?
- What role should executive leadership play in removing barriers?

“Sales performance is rarely a sales-only issue. Real progress comes from alignment across the business.”

WHAT BETTER LOOKS LIKE

Measurable outcomes that create lasting business value.



Higher revenue growth



Improved win rates



Stronger team performance



More efficient sales processes



Better cross-functional alignment



Greater customer satisfaction



WHEN THE DIAGNOSIS POINTS ELSEWHERE:

If the primary issues are related to go-to-market strategy, market positioning, CRM effectiveness or talent strategy, we can help you determine the right path.

LET’S TURN INSIGHTS INTO A STRONGER SALES ORGANIZATION. ➔

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From insight to action. Design and execute a sales operating environment that delivers results.

Sustainable improvement comes from the right changes, executed well, and reinforced over time.

6



WHAT DOES BETTER ACTUALLY LOOK LIKE?

Define the destination.

- What are the specific outcomes we want to achieve (revenue, margin, win rates)?
- How will success improve customer experience and retention?
- What capabilities will our sales team need to be successful?
- What will be different for our people, customers and the business?
- How will we know we've created lasting value?

"If you don't know what better looks like, it's impossible to know if you've arrived."

7



WHAT NEEDS TO CHANGE — AND WHAT SHOULD REMAIN?

Make deliberate choices.

- Which areas (people, process, systems, structure) require the biggest changes?
- What is working well and should be retained or scaled?
- Are there quick wins and longer-term initiatives?
- What trade-offs will we need to make?
- How will we prioritize what gets done first?

"Not everything needs to change. The key is changing the right things."

8



HOW WILL WE COMMUNICATE, DOCUMENT AND ALIGN ACROSS THE BUSINESS?

Create clarity and enable collaboration.

- How will we communicate the purpose, plan and benefits of the change?
- What documentation (processes, playbooks, tools) is needed?
- How will we align with Marketing, Finance, Services, Customer Success and other key stakeholders?
- What feedback mechanisms will we use to stay aligned and adjust?
- How will we ensure consistent messaging and execution?

"Alignment turns good strategy into real-world results."

9



HOW WILL THE ORGANIZATION IMPLEMENT AND ADOPT THE CHANGE?

Turn plans into progress.

- What is the implementation plan and timeline?
- How will we prepare, train and support our people?
- What resources, tools or external support are required?
- How will we drive adoption and address resistance?
- Who is accountable for each element and how will we maintain momentum?

"Change succeeds when people are equipped, supported and empowered to make it real."

10



HOW WILL WE MEASURE SUCCESS AND SUSTAIN IT?

Be disciplined about outcomes.

- What are the key metrics (revenue, win rates, pipeline quality, productivity)?
- How will we track progress and communicate results?
- What cadence will we use to review, learn and adjust?
- How will we reinforce the right behaviours and hold ourselves accountable?
- What will we do to ensure continuous improvement over time?

"Transformation isn't a project. It's a discipline."

WHAT BETTER LOOKS LIKE

Measurable people outcomes that create lasting business value.



Stronger hiring decisions



Faster capability development



Better current-role performance



Greater leadership depth



Higher engagement



Stronger retention



More consistent accountability



Sustainable team performance



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