

## Case Study

### Sales Diagnosis – Healthcare IT Firm

**Scenario:** A 30-year old healthcare IT firm with a strong regional presence in public health clinics had recently purchased a company whose product-line opened up a new, national healthcare market within correctional facilities. The CEO wanted recommendations on strengthening their sales & marketing capability so they could dramatically accelerate their revenue growth; from \$19 million to \$80 million within 5 years. He also wanted recommendations to help him evolve their ability to manage a much larger company.

**Engagement:** One advisor led the diagnosis, analyzing current strategies, organization, processes, tools, standard practices, customers & prospects and assessing all sales & marketing personnel. He then shared his diagnosis of current capabilities along with his recommendations and implementation roadmap with two other advisors: one with broad healthcare knowledge and the other with broad marketing skills. Utilizing this complement of experienced perspectives, the diagnosis was enriched and a comprehensive set of recommendations, along with prioritized 120-day and 1-year action lists, were delivered to the CEO.

**Results:** The CEO moved forward confidently implementing the highest-leverage elements of the 120-day roadmap, using a combination of internal and Harvest resources. Key implementation areas included: filling out a national sales force using job descriptions and hiring criteria developed by Harvest, sales training for the Customer Service Reps (CSRs) who are responsible for increasing sales at current customers (Harvest delivered two sales workshops tailored for the CSRs), improving the RFP process by institutionalizing their knowledge, developing a more robust onboarding process for sales people to accelerate their time to productivity, and developing a more consistent marketing strategy to increase sales leads.