



MOHR Advantage

EXECUTIVE BRIEFING

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Sales Operations - Build a Foundation to Exceed Growth Targets

Leaders continue to navigate Sales Operations, Sales Enablement, Sales Effectiveness (SOEE) to drive improved performance. Defining an effective SOEE model can be challenging. The outline below will focus specifically on Sales Operations and provide guidance to establish a framework for success.

As Sales Operations continues to evolve, more employers are researching and refining the responsibilities of this critical function. Building or rebuilding a Sales Operations team requires strategic vision, purposeful design, and enterprise investment.

In order to develop a Sales Operations discipline, employers must outline strategy, structure, responsibilities, and skill expertise to deliver the intended results.

Sales Operations - tactical functions that support enterprise strategy to improve sales performance, product adoption, client retention, and reduce churn. A strong focus on data management, process design, and enabling technology will create a solid foundation for profitable revenue growth.



DATA MANAGEMENT

- identify key data capture and strategic importance
- establish governance and data quality measurements
- outline compliance metrics to ensure meaningful insights
- measure value and continually enhance the data model



PROCESS DESIGN

- define efficient workflow to deliver strategic enterprise results
- outline process, responsibilities, and training to drive adoption
- measure compliance to improve reporting insights
- evaluate enterprise engagement and impact to align success



ENABLING TECHNOLOGY

- foster adoption of Client Relationship Management (CRM)
- prioritize enabling technology roadmap to support strategy
- develop infrastructure to strengthen sales and client retention
- connect multiple data sets to improve segmentation analytics

SOEE what's the value...

Sales Operations provides the linchpin to Sales Enablement and Sales Effectiveness. The SOEE alignment will improve

performance and provide analytical insights to alter and refine business strategy. In today's data driven economy, real-time dashboards, reporting, and quick adaptation are key to navigating a competitive marketplace.



Sales Enablement - Accelerate Business Development with Enterprise Alignment

Business development is one of the most challenging areas that leaders face in today's economy. With information available in seconds, **sales strategy, execution planning, and tactical operations must align throughout the enterprise.** In many cases, Centers of Excellence have competing agendas and unique priorities. Unfortunately, these conflicting priorities impact front line sales, product adoption, client retention, and Business Unit objectives.

Therefore, strong visionary leadership is required throughout Sales Operations, Sales Enablement, Sales Effectiveness (SOEE) to drive successful enterprise coordination. Relentless communication, teamwork, and continual transformation are instrumental to a successful SOEE model.

This section will focus specifically on **Sales Enablement** and **provide guidance on a potential framework.**

In order to develop **Sales Enablement**, employers must first **define this critical function.** With multiple definitions in the marketplace, employers often commingle terminology (related to Sales Operations and Sales Effectiveness) and cause confusion with strategic and tactical responsibilities.

Sales Enablement - systematic alignment of technology, business development, enterprise strategy and initiatives to produce efficient and effective client engagement.



ENTERPRISE ALIGNMENT

- align sales, product adoption, retention, revenue objectives
- build strategic and tactical operations to drive plan execution
- establish communication, training, change management process
- adapt and learn from data insights and business intelligence



BUSINESS DEVELOPMENT

- coordinate sales, marketing, product innovation strategy
- organize market approach with technology solutions
- align contracts, product, pricing, solution catalog within CRM
- define success metrics, analytics, and performance targets



PROFESSIONAL GROWTH

- connect vision, strategy, and responsibilities to individual roles
- create value message, centralize and manage content library
- define consistent onboarding, training, and development
- build collaboration and communication to drive performance

SOEE what's the value...

Sales Enablement compliments Sales Operations and Sales Effectiveness. Alignment and coordination of SOEE has become a new challenge as the market continues to fragment each area of discipline. **The harmonization of each interdependent function is critical to sales performance, product adoption, client retention, and profitable revenue growth.**

Sales Effectiveness - Develop Strategic Insights, Performance Analytics, Segmentation Metrics

Sales Effectiveness is one of the most significant areas of expertise for an organization to mature. Many definitions, opinions, and challenges influence what appears to be a simple concept. Understanding and aligning each interdependent function; Sales Operations, Sales Enablement, Sales Effectiveness (SOEE) is the key to successful performance analytics, segmentation metrics, and strategic insights.

Sales Operations must develop and connect enabling technologies, process design, and data management to create a high degree of efficiency with data capture and data integrity.

Sales Enablement must align enterprise strategy and vision with business development, marketing, product innovation, and professional growth to produce efficient and effective client engagements.

Sales Effectiveness must create strategic segmentation, analytics, and performance measurements to improve the business model through tactical planning and market insights.

Complete alignment of the entire SOEE model is a **competitive differentiator**. As competition creates go-to-market strategy with inaccurate and incomplete information, a business that is SOEE disciplined, will capitalize on well-defined data analytics. Visionary leadership, strong communication, and relentless execution create the most insightful Sales Effectiveness teams.

Sales Effectiveness - analysis and evaluation of sales performance, product adoption, client retention, and revenue capture. Provides analytical insights to Sales Operations and Sales Enablement to enhance strategy and tactical plan execution.



SEGMENTATION

- define data capture that impacts revenue growth
- evaluate and build segmentation technology models
- overlay additional internal and external data insights
- refine ongoing data management and process design



PERFORMANCE

- establish targets and clearly define incentive metrics
- leverage segmentation data to develop territory models
- maintain current and historical performance analytics
- evaluate, realign, and invest based on analytical insights



INSIGHTS

- design real-time dashboard analytics and reporting
- identify performance gaps through data interpretation
- develop sales to revenue recognition forecast models
- measure execution against key strategic initiatives

SOEE what's the value...

Sales Effectiveness provides critical insights to Sales Operations and Sales Enablement. The development of business intelligence, real-time dashboards, and strategic metrics create transparency to further refine tactical operations. Continual go-to-market transformation, based on data interpretation, is paramount to sales performance and profitable revenue growth.



Prior to founding his company, Michael spent 28 years with private, public, and S&P 500 corporations. His experience was developed through 16 corporate acquisitions that delivered revenue growth from \$42M to \$760M, and became part of a \$3.3B enterprise. His leadership roles include Executive, Business Unit, Sales, Sales Operations, Client Relations, Product Innovation, and Practice Leader, Merger and Acquisition Consulting. Michael is currently a member of the University of Missouri - St. Louis Finance and Legal Advisory Board and has been active with the St. Charles County Pet Adoption Center as a Foster Family since 2008.

Mohr Advantage assists organizations and leadership teams in the area of Sales Operations, Sales Enablement, and Sales Effectiveness. His firm helps define, architect, and create high performance sales infrastructure to accelerate profitable revenue growth.

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