KNOWLEDGE TRANSFER CASE STUDY

TEAM BEST-PRACTICE SHARING

Best-practices adopted across a salesforce

SITUATION: The sales division for a global organization recently updated their CRM and was changing the way they approached and serviced clients. Leadership contacted us to requesting a knowledge transfer service. The goal was not only to identify and document the best practices of high-performing teams, but to ensure these insights could effectively be shared and adopted by sales teams across different regions and markets.

Our Solution: Team Best-Practice Sharing.

Leadership Kickoff Session

We kicked off the process by meeting with sales leadership to identify critical areas of focus for best-practice sharing.

Key focus areas included:

- Advanced consultative selling techniques
- Efficient use of CRM systems for pipeline management
- Relationship-building strategies with key accounts

Team Interviews

Our knowledge transfer coaches conducted in-depth interviews with members of high-performing sales teams. These interviews focused on understanding the specific tactics that led to their success, such as how they approached challenging accounts, the mindset needed to drive deals forward and how they overcame obstacles like pricing objective or competitive pressure.

Alignment Session

We facilitated an alignment session with sales leadership to evaluate the stories and practices gathered from the interviews. During this session, we prioritized the practices that had the highest potential to be impactful across teams.

Team Best-Practice Learning Program

Based on the insights gathered, we designed a blended learning program to share the best practices with entire sales force. This program included a variety of learning formats to cater to different learning styles such as:

- **Internal Website**: A dedicated section on the company's internal site where detailed case studies, videos, and other resources could be accessed by all sales staff.
- **Lunch and Learns**: Interactive sessions where sales teams could discuss best practices and how they might apply them in their own contexts.
- **Podcasts**: Episodes featuring in-depth discussions with high-performing sales teams sharing their challenges, approaches, and insights.
- **Videos and Courses**: On-demand content for deep dives into specific strategies and techniques.
- **Email Newsletters**: Regular updates highlighting key best-practices and success stories.

Result

- **Adoption of best practices**: During monthly leadership meetings, regional sales managers explained how their teams were implementing best-practices.
- **Increased collaboration**: Sales teams began to proactively share their own insights and learning with their peers. Year-end survey results showed peer learning was one of the most impactful experiences, and open-ended feedback frequently mentioned how much they valued hearing real stories and team practices.
- **Scalable learning program**: The learning materials that were developed provided a scalable and flexible way to share knowledge, ensuring that all sales professionals, regardless of location or experience level, had access to the resources they needed to succeed.

Details in this case study have been slightly altered for client confidentiality.

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Email learn@lpisolutions.com or call (808) 853-0325 to learn more!