

The Challenge

A leading risk management consultancy generated strong lead volume through highly capable practice leaders— yet only a fraction of opportunities converted to clients, and only few developed into lasting relationships.

Key Problems Identified:

- Low conversion from opportunities to customers and predominance of short, project-based engagements instead of retainers
- Existing clients generate 80% of revenue, yet cross-/upsell is weak and multi-department penetration among top clients remains low
- Inconsistent sales methodology and lack of structured account planning across practices

Organisational Sales transformation

Baseline Measurement & Gap Identification

- Ran management workshops to map the sales landscape
- Measured conversion, deal velocity, and client utilization (HubSpot baseline)
- Visioned strengths and sales methodology gaps
- Built a KPI framework to track progress

Structured sales training & coaching

- Customer understanding and buyer profile mapping
- SPIN-based, needs-driven discovery
- Retainer-based consultancy models
- Account management, cross-selling, and upselling

Implementation of a KPI-accountability framework

- Designed a KPI framework with leadership to align sales activities and strategic goals
- Defined role-specific KPIs for practice leaders and consultants, linked to management priorities
- Introduced structured review cadences (weekly pipeline, monthly performance, quarterly strategic reviews) led by management
- Equipped managers with data-driven dashboards to steer behaviour, coach teams, and ensure sustained governance

Key Success factors

- **System Over Skills:** Systematized methodology (KPIs, account planning, structured reviews) ensured consistency across organization.
- **Management Ownership:** Practice leaders engaged in design, owned KPI targets, conducted weekly reviews.
- **Existing Client Focus:** Recognized 80% revenue from current clients; shifted growth strategy to account expansion

Results

From volume to velocity

Conversion Rate Improvements

- More opportunities advanced beyond discovery stage
- Higher close rates through buyer profile mapping & SPIN questioning
- Faster sales cycles via structured processes

Client Lifetime Value Growth

- Retainer adoption increased recurring revenue base
- Measurable increase in multi-department clients
- Average deal value +25% (upsell targets)
- Sustained growth through account planning

Operational Excellence

- Predictable pipeline driven by KPI-based activity
- Practice leaders focused on high-impact activities
- Data-driven decision making via HubSpot integration
- Real-time visibility into pipeline, activity, and conversion rates

Behavioural Transformation

- **Sales Mindset:** From product-centric to solution-centric
- **Cross-Department Collaboration:** Broken silos; integrated client solutions
- **Accountability Culture:** Shared responsibility for measurable outcomes