



*Dedicated to the development of critical competencies
in adults for change and growth.*

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Problem/Opportunity Statement

Define the intervention to effectively and quickly transform my sales organization from a non-professional 'features and benefits' pitch sales process, into a professional 'consultative sales process'.

Project Focus and Background

First Pacific Corporation (FPC) is a solid organization with a very strong history of customer intimacy and profitability. They provide a suite of services to dentists helping them improve the profitability and service of their practices. These services include receivable financing, practice management software and hardware, and an extraordinary level of field support from a service team dedicated to helping the doctors improve their practices. FPC's growth has stayed at a steady pace of about 10% per year. The owner has brought in new management to transform the organizational process to more effective and current technology with an ESOP planned in the future if the performance of the organization improves. I have, as the Senior Vice President of Sales and Marketing, the task of transforming both the sales and marketing operations of the organization. This needs assessment is focused on only the sales process, however, intervention in this arena will impact marketing and marketing transformation will be included where necessary.

This is a critical project and it is necessary to have effective and fast transformation without putting the whole sales force into shock. The intervention introduced will be the foundation of the future sales process for the organization and will have a profound impact on the way other parts of the organization interact with each other and the sales team. The corporation is located in Salem Oregon but has sales people throughout 23 states and this will increase. Each sales person is averaging only one sale every other

month and this is unsatisfactory. FPC is building a new facility and is moving Jan 2002. The designed facility is to accommodate substantial growth. The expected incremental sales volume is to improve dramatically.

Purpose of Project

The purpose of this project is to quickly assess the current state of affairs in the sales organization at FPC, define the desired result, and design and implement intervention to bridge the gap. FPC expects the whole process to transform the way they interact with their customers in the sales process and as an added benefit, improve the design of internal process to better support the effort of developing delighted and loyal customers. This process is to fully integrate into the rest of the organization and organizational processes are to be transformed to support the newly implemented sales process.

Importance of the Project to the Future of the Organization

The dental practice solutions industry is highly competitive and is in the process of consolidating. The best designed, positioned, and presented solution sets will survive and thrive in this market. FPC is position well to be the industry leader in high value solutions. The way the sales force is perceived is a major portion of the value presented and as deployed now, is not a benefit to the customer. This must change. If we transform the sales process and professionalism of the sale force, FPC will be in an excellent position to take the leadership in this high value market.

Proposed Research Methodology

1. I immediately traveled with one of the sales people for one day to observe the sales process and ask questions about the clients, their needs, and their concerns. I observed the sales process and had an opportunity to ask questions about the process. During this process, I asked:
 - Hypothetical questions to explore how the sales person might handle the situation with a different process
 - Devil's advocate questions to explore how entrenched the sales person was with the existing process

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- Interpretive question to try to gain insights to why the sales person felt the results were weak and if indeed he felt the results were weak
2. I immediately traveled with on the field customer service people for one day to observe the support process, learn the solutions, and ask questions about the clients, their needs, and their concerns. I observed the support process and had an opportunity to ask question about the process. During this process, I again asked:
 - Hypothetical questions to explore how the support person might feel about a consultative process
 - Devil's advocate questions to explore how entrenched the sales people that she worked with were with the existing process
 - Interpretive question to try to gain insights to what the sales people felt about the results
 3. I am participating in a 7day conference with the sales team and will have extensive opportunity to observe, question, and present new paradigms for professional performance. This will be a highly interactive format and I should be able to gain the insights into each sales persons performance to understand how to design intervention to move the team to a new plain.
 4. I had an extensive talk with my VP of Sales about the process he has been teaching, its foundation and background, and tested his willingness to move from that position. I used the above questioning techniques as well as challenging his positions with counter scenarios.
 5. I will be personally visiting dental practices and interviewing doctors and practice managers to test existing perceptions of the environment, attitudes, and practices in these offices.

All of this work will be completed within two weeks. I will be researching intervention and beginning to design the components of intervention well before my research is completed.

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Associated Project Costs

The costs involved in this research are inclusive to my time. There are no other costs involved.

Other Issues

The major issue is to set the stage for transformation without telling the sales team that they are doing their work incorrectly. To do this I will be doing the following:

1. I will be introducing my background, philosophies, and my beliefs to gain trust and rapport.
2. I will be complimenting the team on the excellent work they have done to get the organization to where it is. I will then talk about taking the organization to the next level and how I want to help the sales team be perceived as the top team in the nation. I will describe the consultative process and the training and commitment the organization will invest in each team member.
3. I will review models and some basic concepts that support the consultative sales force.
4. I will be posing questions for the teams to solve given the context of a consultative process.
5. I will seek leaders that can model the consultative process with proper training and introduce them into the sales force as peer leaders and trainers.
6. There are many other steps to implement, which I have not yet defined.