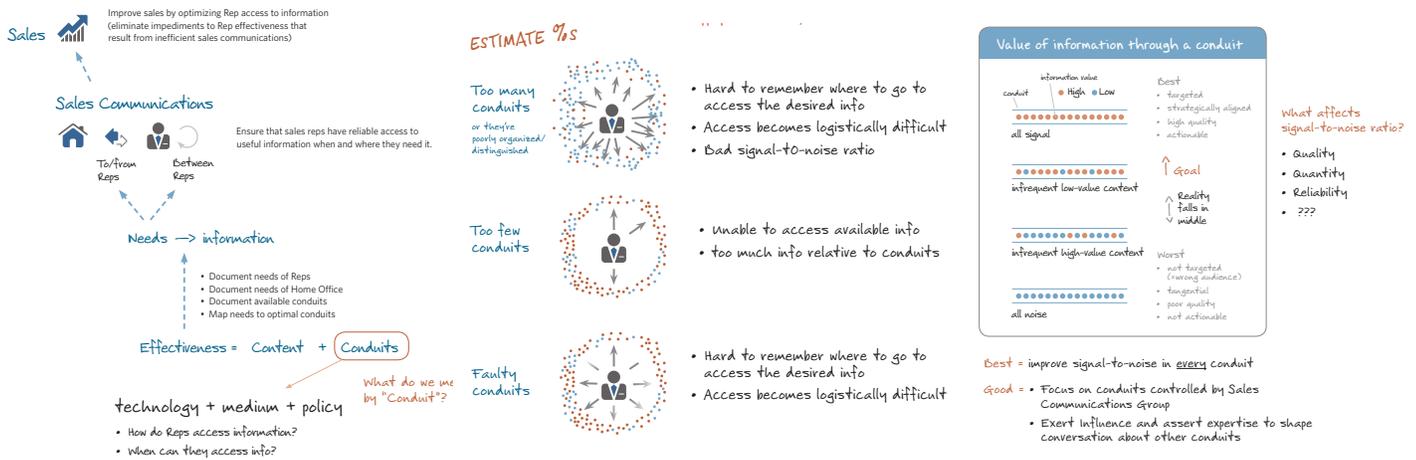


# Improve sales communication and knowledge management systems



## Situation

This confidential client was under pressure to improve sales. They recognized that inefficient sales communications and knowledge management were impeding performance and were taking steps to filter and streamline communications. However, the scope of the problem, evolving technologies, political pressures, and the speed of the environment hampered efforts to develop long-term solutions.

## How we helped

First, we audited the client's intranet so that sales-related content could be evaluated and recategorized to improve usability. Next, we mapped the flow of information in the client's sales communications ecosystem, which provided baseline documentation for planning and helped the client better understand the complexity of their situation. We then worked with the client to refine and present an integrated organizational model for transforming information > knowledge > skills > results that could be used by sales management to advocate for resources and shape organizational change.

A few months later, the client asked us to help them develop a plan for streamlining how information was distributed to and collected from their sales force. Although the client was initially focused on technology challenges, our approach helped them see that their real need was to develop a *sustainable and flexible*

process for evaluating needs and options, making decisions, and setting priorities. Working closely with the client, we developed a plan for validating audience and organizational needs, identifying optimal communications channels for different types of information, and establishing guidelines for future decision making.

## Services provided

- Information and communications audit
- Analysis and consulting
- Visualization
- Stakeholder communications
- Research

## Outcomes

- Sales management adopted an integrated organizational model to support the transformation of sales knowledge into results
- Established principles to guide the evolution and management of sales communications
- Reorganization of intranet-based sales content enabled a dramatically streamlined user experience