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Building a New Business to Business Sales Model

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Introduction

"The Company" is a pseudonym for a capital equipment manufacturer that supplies conveyor equipment primarily to the consumer package goods (CPG) industry. Consumer packaged goods are products like cookies, crackers, juice, hair care products, pet food, and laundry soap. Many of The Company's customers are well-known companies such as Mars, Unilever, Kraft-Heinz, JM Smucker, General Mills, Kellogg, and Procter & Gamble.

Founded in Wisconsin in 1976, The Company's focus was on manufacturing and solving the customer's product handling problems. Most of the solutions were custom in nature and required a lot of people resources to meet customer project due dates. The founder's son, has been with The Company since the beginning and his role and operation influence grew as the years passed. Today, the founder's son is the CEO having bought The Company from his father when retired in 2012.

As with many father – son relationships, sometimes they agreed how to run the business, many times they did not. One area that they did agree upon, was the sales channel. While there were many debates on how to engineer a project, they knew they needed to let the front-line sales activities be handled by sales professionals. The sales professionals were third-party organizations who, as was the norm in the 1980s and 1990s, would "wine and dine" the client to close the deal. By the late 1990s, customer's attitudes towards that type of sale process was starting to change. Some customers established polices that would not allow for even the gift of a paid lunch, let alone tickets to a professional football game. Further, customers did not want to communicate with a third-party sales organization but preferred to speak directly with the manufacturer. The Company recognized there was a significant shift happening, but was not prepared to respond to the market. The Company was a manufacturing company that cut steel,

assembled conveyor equipment, and built electrical control systems to power the equipment. The Company was not staffed or equipped with sales professionals to work the front-end of the sales process. In fact, The Company's culture did not favor sales people, as they were stereotyped as "well-dressed purveyors who were liars and sleazy." Now the company had to hire their own sales people and create a sales process.

Fast forward to today. The Company has struggled to build a sales process that will address customers' needs and grow the company at the same time. Moreover, sales have been flat for over ten years, averaging about $28,000,000 a year. The owner has been clear he wishes to grow sales to $40,000,000, but past sales process initiatives have failed to stick or have taken a back seat to manufacturing processes.

Company Sales History

Data was collected from the customer relationship management (CRM) database in 2020. The CRM contains a collection of related information (Evans, 2016). Specifically, the CRM houses information such as customer name, address, contact names for each company, dates of interactions with the customers (phone calls, meetings, emails), and project opportunities. Sales history data was collected by interviewing the Vice President of Finance (VPF).

The sales line graph below (Figure 1) shows annual sales by calendar year (CY) since 2012. For 2020, sales data is through June 30, so the figure was doubled to annualize the data for year-over-year comparison. A trend line was added with an R-squared value. R-squared will describe the "fit" and if there is a relationship between data (Evans, 2016). The sales data shows a very slight upward trend line to suggest slight growth. However, the R-squared value, the relationship of annual sales with annual sales, of .0242 indicates there is little or no correlation of growth year over year. Sales are flat under the current sales model.

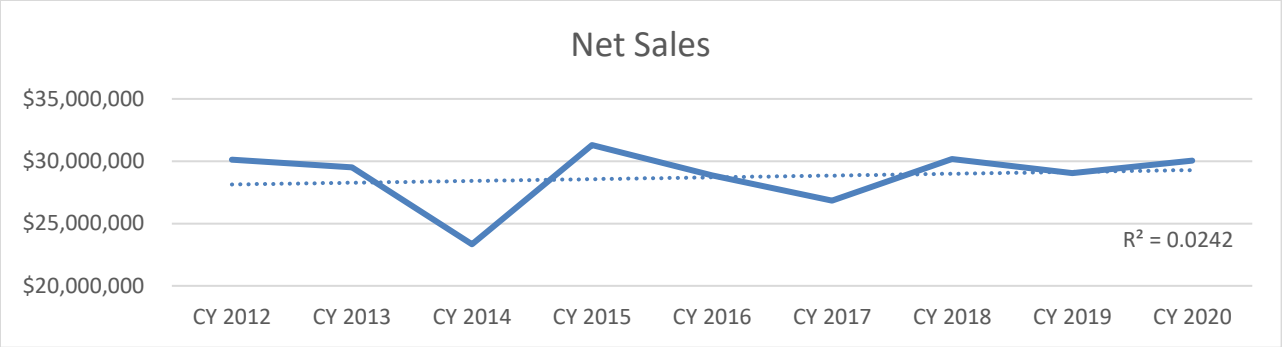

Figure 1: The Company's annual sales 2012 to 2020

Current Sales Structure

The current sales structure consists of two groups: the outside sales team and the inside account manager team. The outside sales team services a territory defined by states. One territory, for example, is Wisconsin, Illinois, and Indiana. The outside team will sell and service end-user customers for a territory. An end-user is a customer who will take possession of the equipment for the use in their production plant. End-user examples are General Mills, Kraft, or Procter & Gamble.

The inside account manager role will focus on third-party customers like engineering firms or manufacturers of other original equipment (OEM). The equipment sold to third-party customers is shipped to an end-user. At the beginning of the buying process with a third-party, the end-user may not be known. Inside account managers may also sell and service to end-users, but these are usually well-established accounts with an existing relationship with The Company.

The Company maintains a website which allows for potential customers to submit a request for more information on equipment. These requests are known as a "sales lead". Depending on which customer and state the sales lead came from, one of the two sales groups will be responsible for following up the lead.

In both sales roles of the current structure, neither of the groups are responsible for cultivating new customers, reengaging old customers, or nurturing existing accounts. Many of the people in sales roles are “object orientated” and not comfortable with what would be considered a traditional sales role with the “people relationship” skills. The Company currently waits for customers to initiate contact when there is an opportunity. Many would call our people “order takers”.

One sales expert would say waiting for the opportunities will put The Company at a competitive disadvantage (Weinberg, 2019). A few disadvantages exist when a company waits for opportunities to come forward instead of chasing them. First, arriving “late to the game” means The Company will play catch-up to a project opportunity was already started by competition (Weinberg, 2019). These other companies started selling and influencing the customer on competitive offerings that The Company need to surpass in service, quality, or price. Second, if an opportunity comes to The Company, that opportunity may be nothing more than the option to bid for the customer’s purchasing process. Many customers require multiple bids for large projects even though they often award the project to an incumbent. The Company would not be seriously considered for the project in this scenario, despite the time and resources needed to complete a bid.

Purpose of the Study

The purpose of this study is to assess the effectiveness of the current sales model and make recommendations to create a new model. The owner of The Company, reflecting on the company’s annual strategic plan, has a new focus on sales. He uses a football analogy to create a picture of the situation. A football team has an offense and a defense. The defense is to protect, stop, and defend a loss. The Owner stated the company has played excellent defense over the

years by becoming more efficient in the manufacturing processes, lowering costs, and avoiding high risk projects. However, The Company has not done as good a job playing offense. An offense scores points to win.

The Company's top sales number, net sales, is not growing as Figure 1 illustrates. The owner stated that the "way we have always done it" is not working any longer. The Company needs a new sales model to provide growth in sales. The owner has also stated that the company needs to be prepared to evaluate current staffing in sales roles. Some of the current staff may need training to expand the sales role, or The Company may need new people who are capable of executing a new sales model.

The success of a new sales model for The Company will take a few years to completely implement and assess. A logical evaluation measure will include these questions: Has the company experienced a clear increase in year-over-year annual net sales that can be attributed to the new sales model? Is The Company able to determine that the new sales model and components of that model have contributed to sales without driving up costs beyond a reasonable level?

Implications of the Study

Perhaps the biggest implications of the study will be the recommendations that impact The Company's employees. Once a vision of the new sales model is created and communicated, people may have a tendency to resist the change initiatives. A need to communicate the new vision purposefully will be needed.

Need for Communicated Vision

The Company will benefit in numerous ways by ensuring that the company vision is well communicated. One benefit is tying individual employee goals and objectives to the larger

company goals. Employees who feel their role in The Company's success will become more motivated (Gallo, 2011). The purpose of communication in organizations is to "achieve coordinated action, to share information, and to express feelings and emotions" (Griffin & Moorhead, 2012, p. 316). Also needed in organizational communication is "verification". Verification is completed once a message is sent and the receiver indicates he or she understood the message (Griffin & Moorhead, 2012). Since employees want to have meaningful goals, but only 14 percent of employees understand The Company's vision, a disconnect may cause a poor communication channel (Witt, 2012). Organizational change expert, John Kotter, states visions are under communicated by a factor of 10 (Kotter, 1996).

Productivity is also hampered by poor communication of company vision. Two in three employees in a study of European workforce indicated they did not understand their company's vision (Eccleston, 2011). This led to employee motivation and productivity issues. Sixty-four percent of employees in the study stated they would increase productivity with better motivation (Eceleston, 2011). Ensuring success for employees, managers should be active participants in setting and achieving their direct report goals (Gallo, 2011).

While most change efforts are not complete failures, few are entirely successful (Kotter & Schlesinger, 2008). Most change efforts take longer than expected, sometimes kill morale, and incur employee emotional damage (Kotter & Schlesinger, 2008). Increasing communication with employees on The Company's vision and goals is imperative for the success of the employee and for The Company.

Resistance to Change Issues

Kurt Lewin's force field model gives insight as to what causes change issues (Hayes, 2010). In Lewin's model, driving forces push towards the new organizational change state. At

the same time, restraining forces are pushing back on the change driving forces. The driving forces could be any number of reasons, such as lagging sales, missed sales goals, increased competition, etc. Four common reasons people resist change are the desire not to lose something of value, not understanding the change and implications, thinking the change efforts will not help the organization, and not being supportive of any change effort success (Kotter & Schlesinger 2008). Resistance to driving forces usually focuses on employee behaviors (Kotter & Cohen, 2002). Specifically, the evidence suggests "that the most fundamental problem in all the stages is the behavior of people" (Kotter & Cohen, 2002, p. 6). Moreover, Kotter and Cohen suggest that people will change more often when given truth that influences their feelings (Kotter & Cohen, 2002).

Under communication and lack of connecting company goals to employees can lead to organizational change issues. Uncertainty during organizational change efforts can develop which will delay or slow progress. One reason for resistance to change is the communicated message itself. Most organizations will focus on a message that contains the strategic issues solely (Hayes, 2010). Strategic issues can be clearly stated, and that may seem logical and reasonable. However, where communication messages fail is to then address the individual's behavior. The individual should be addressed with a specific message. This message should focus on the employee's job-related issues (Hayes, 2010). Without a clearly communicated message specific to employees, resistance to change can develop. This communication addresses the emotional needs of the individual employee.

See-Feel-Change

Making the new sales model vision of the company stick to the desired new state is a challenge. Using Kotter's See-Feel-Change (Kotter & Cohen, 2002) to achieve a successful change could be beneficial to the change initiative for The Company to succeed.

See: Help people see and visualize the problem. The Company's sales have not grown and remain flat. Increased sales growth is needed for the company to grow and thrive.

Feel: This needs to be an emotional connection of how The Company has lost important customers and how there are new customers who need the company's products. A physical demonstration will make the best connection.

Change: The Company continues to have a solid reputation in the industry and will capitalize on that reputation by seeking new sales and growth to benefit all of the organization.

The Company has focused much of their attention on "defense" which aligns more with object orientated people and tangible elements. Improving a process or reducing costs comes naturally to most engineers. The sales model change will impact how people *feel* about their job and the company. To succeed in communicating a new sales model vision, The Company will need to take the whole person into consideration. In particular, the whole person includes communicating and communicating often. Using a person's feelings to see why change is important.

Business-to-Business Sales Defined

Products and services are sold in three primary channels. One channel is business-to-government (B2G) at the federal, state, or local levels. A bidding process is common when securing sales in B2G (Warren, 2019). The buying can be long and complex. An example of B2G is when a school district purchases computers from Apple, Inc.

The business-to-consumer (B2C) is one of the most recognizable of channels. In this channel, the marketing of a product or service is directly with the consumer. The buying cycle can be much shorter and simple. Examples are purchasing a pizza after trying a sample at a grocery store or buying clothing online. Much has been written and studied on consumer behavior as the messages are generally used to evoke emotions or impulse (Warren, 2019).

The B2C sales channel is also described as having an impersonal buyer-seller relationship (Strauss, 2016). Many transactions are completed quickly in retails stores or in an even less impersonal manner on an ecommerce website. Risk of the purchase is also less in a B2C transaction. If someone doesn't like product or service purchased, they may just not buy it again. A consumer's loss on a B2C purchase typically does not impact their lives more than an inconvenience or a tolerable financial loss.

The business-to-business (B2B) channel is described as having rational or economic purchasing decision (Hawkins & Mothersbaugh, 2013). Similar to B2G, the buying cycle can be long and complex. An example of B2B is auto manufacturer purchasing tires from a supplier to use on the vehicles produced. Unlike the B2C, channel, the B2B buying process may involve many individuals throughout an organization. These individuals are called decision makers or stakeholders (Cohn, 2015).

While B2B purchasing decisions are considered to be rational, "understanding organizational purchasing requires the same concepts used to understand individual consumer" behavior (Hawkins & Mothersbaugh, 2013, p.660). Looking deeper into the "rational" belief might be a misnomer once realizing people are still influencing the buying decision. Since there are multiple decision makers in an organizational purchase, especially large purchases, even a "no" from one individual doesn't mean the sales process has come to an end. It may require the

sales person to either start from the beginning or to look for different stakeholders in an organization with which to connect. Moreover, the sales person will need to understand the various decision criteria of all the individuals involved in the decision making process. The sales person will need to understand each individual's power, expertise, and degree of influence in the organization for a successful sale (Hawkins & Mothersbaugh, 2013). Therefore, the buyer-seller relationship in B2B is closer and far more interpersonal (Strauss, 2016). The best sales people will take time to understand the customer's situation in what is called the discovery phase (Weinberg, 2019). The customer's situation will include understanding their "current state, needs, threats, initiatives, challenges, objectives, and desired future state" (Weinberg, 2019, p. 154) by asking questions.

The Director of Purchasing from The Company felt that most sales people fail to ask questions, understand his goals, and even what risks he faces with purchasing decisions. This Director of Purchasing stated he felt there is more risk in B2B buying decisions because his job could be on the line. If he fails to procure the right materials or inventory timely, his job performance will come into question and may cost him a raise or worse consequences. Further, he stated that once he establishes a good working relationship with a supplier, he continues that relationship as long as it continues to meet expectations. He evaluates criteria such timeliness of returning messages, solving problems effectively, such as a warranty issue, or if a supplier can respond to expedited requests.

To illustrate, the Director of Purchasing believes there is emotional buying decisions cloaked in rational behaviors. Research has helped support this claim. CEB Marketing research indicated 48% of B2B customers wished to buy a new solution but did not do so out of fear (Kim, 2015). This fear could result in losing time, effort, credibility, and even their job (Kim,

2015). Gallup research shows suppliers will become more successful in their B2B sales once they build relationships that help their customers succeed (Nink, 2020). The Gallup data also shows that winning on low price alone will not secure long-term relationships (Nink, 2020). Building strong relationships based on advice will trump price. The only way for a sales professional to offer advice is to build solid interpersonal relationships. A common mistake sales people make early in the relationship is offering a solution without taking time to understand the customer's situation. As one sales training professional states, "it is impossible to be a trusted advisor when you pitch before you probe" (Weinberg, 2019, p. 154).

Customer Relationship Software

A customer relationship management (CRM) program is a database software that was once used only to track satisfaction, commitment, and retention of key customers (Hawkins & Mothersbaugh, 2013). Today, businesses rely on a CRM for so much more, according to The Company's Director of Information Technology (DOIT).

The Company uses their CRM for marketing, prospecting potential customers, sales reporting, and tracking progress of opportunities. Many CRMs are now integrated with other business applications such as enterprise resource planning (ERP) software. An ERP software consolidates and automates business function like production, sales quoting, and accounting (Wood, 2020). Integrating the CRM with the ERP enhances data analytics, according to The Company's DOIT. The DOIT went on to say analytics go beyond telling us what happened, but alos try improve current opportunities or predict future events.

Database software is dependent on the good, clean, accurate data entered (Schmelzer, 2019). In the sales world, there is a dislike for CRMs as they over promise, under deliver, create more work, and decrease productivity (Roff-Marsh, 2015). Poor attitudes towards the CRM will

result in poor data input from the very people who will benefit from it the most. The Company's CRM has been in place since July 2016. According to the The Company's Director of Applications (DOA), the data input into the CRM has gotten better, but there is still an unwillingness for the sales team members to ensure they are putting in good data and in a timely manner. The DOA goes on to say that most of the sales people are not using the CRM as a planning tool to help grow and manage their customers.

There is a training opportunity here for the sales people to see and feel why there is a benefit for better CRM data and practices. An individual resistance to change could be for a number of reasons such as breaking habits, sense of security, or lack of awareness (Griffin & Moorhead, 2012). A new sales model will need to address these resistances to change. While there are poor attitudes towards CRMs, it is also recognized there are benefits with CRMs. The ability to associate sales activities to initiatives, automate routine tasks, and marketing lead management are agreed upon positives (Roff-Marsh, 2015). Successfully utilizing the CRM will be important to the success to the new sales model.

CRM Data Analysis

One purpose of a CRM is to use data to display results and identify trends. A trend is a gradual upward or downward movement in the data over a period of time (Evans, 2016). The ability to interpret trends will help identify effects that are seasonal or cyclical (Evans, 2016). There will be effects that have other causes that a sales manager will need to investigate. For example, a change in sales personnel, economic impacts, or customer preferences would all need to be investigated. Data and analysis to show current opportunity data in the company CRM.

The DOA from The Company provided data from opportunity data from the CRM from 1-1-2017 to 7-30-2020. An opportunity is a project quote from a customer. Each opportunity will

contain information like date opened, customer name, dollar amount of project, the sales representative, sales territory, and if The Company won the quote. The DOA felt the opportunity data entry has been much better in the last couple of years due to more accountability on entering data.

The data harvested showed 2,898 opportunities totaling $244,738,744. Due to turnover of sales personnel, it was concluded that categorizing the sales people by territory would be best. The territory for the quick-ship sales are MCE 1. The outside sales territories are described as T 1, T 2, T 3, and T 4. The inside sales account managers are AM 1, AM 2, and AM 3. In summarizing the Table 1 and Table 2, MCE 1 is separated from the other sales territories. The quick-ship product is different in that individual orders are smaller and higher volume. The quick-ship product is a standard conveyor that uses pre-engineered components that allow The Company to ship to a customer in less than four weeks. The quick-ship sales are 12% to 15% of total annual sales. The majority of the sales, therefore, are sold through the outside and inside sales teams.

Reviewing Table 1, the initial observation is the quick-ship MCE number of opportunities averaged per month. Year 2017 shows almost double the number per month compared to 2018, 2019, and 2020. The average dollars per month are also decreasing substantially each year. The DOA concluded there was a change in personnel in May 2018 when the quick-ship sales team went from two to one person. The one who left the organization was more apt at entering data into the CRM. The sales person who remained is not as diligent to enter data. Overall sales for the quick-ship product has remained steady even with only sales person, so The Company didn’t feel there was a need to replace the person who left. The DOA also

stated there was a lot of push back from the quick-ship sales person using the CRM as it was felt to be nothing more than data entry busy work.

Table 3 shows a common size of the data per individual territory to the annual total. Table 3 summarizes the Table 1 for a different view of the data. Since 2017, AM 2, AM 3 and T 1 account for 61% of the total number of opportunities. The DOA indicated that AM 1, however, has had total sales much greater than what Table 1 or Table 3 suggest. The conclusion is AM 1 is not using the CRM.

Table 2 and Table 3 are also indicating a decrease in opportunities for T 3. This territory has seen the most personnel turnover and is currently vacant. A member of The Company's estimating department is processing the quote opportunities for this territory. However, it seems to be clear that not having someone in the territory consistently, is hurting sales performance in this territory.

One surprise for the DOA was the performance of T 4 territory. The outside sales person for this territory has the least seniority. While the T 4 sales person is struggling with total sales, the number of opportunities and dollars has improved in 2020. The next step for the sales person in T 4 is to close the increased opportunities and thus increase sales.

Close ratio is dividing the number of opportunities won by the total number of opportunities. This number indicates how successful a sales person is at winning business opportunities. Table 5 data indicates The Company is realizing a 5% decrease (37%) in 2020 compared to four-year high of 42% in 2019. A five percent decrease in a close ratio on $60,000,000 of annual quotes would equal $3,000,000 in lost sales. Specifically, AM 1, T 1 and T 4 have seen the largest decreases in their close ratios. For T 1, this is even more impactful

since this sales person accounts for the largest percent of total quotes for 2020, at 25%. A decrease in close ratio for T 1 from 2019 to 2020 is over $1,000,000 alone for this one person.

The CRM data analysis also indicates three large food customers have shifted their business away from The Company. Table 6 shows three different, publicly traded food manufacturers. Company A from Table 6 is a contract packager food company. A contract packager manufacturers food products for other companies. For example, a food company may not have the resources to produce their product and will research out to a contract packaging company to manufacture it for them. Company A produces energy bars, cookies, crackers, snacks, and cereals. The Company has seen opportunities decrease from $1,600,000 in 2018 to almost $71,000 in 2020.

Company B is a food company that was established in 1928 and has over 30 manufacturing plants across the United States. This company, widely known for their baking products and cereals, has added ice cream, pizza, soups, and pet food to their line up over the years. The Company has seen opportunities decrease from $1,700,000 in 2018 to $289,000 in 2020.

Company C from Table 6 is food company that manufactures food and beverages for the US and international market. Company C brands include cookies, crackers, drink mixes, and candy. The Company has seen Company C opportunities decrease from $1,220,000 in 2018 to $238,000 in 2020.

The three food company customers in Table 6 totaled $4,520,000 in opportunities in 2018. In 2020, The Company has seen the total opportunities decrease by almost $4,000,000. When the DOA asks the sales people responsible for these customers about the decrease in opportunities, there is not a known reason for the decrease. Indicative to the lack of planning in

the CRM, none of the three companies have any future planned calls. The Company's sales team appears to be waiting for these companies to call them.

Business-to-Business Marketing

Business-to-Business (B2B) marketing is different than marketing to a consumer. While there are some similarities, the messages and to whom they are sent are different. A final buying decision is considered to be rational (Hawkins & Mothersbaugh, 2013) in B2B. However, unlike B2C buying decisions, there are more people involved in the decision making process. Research shows there are an average of 5.4 decision makers in a B2B purchase (Spenner, 2017). This will make the buying decision more complex and take longer compared to the B2C process. In the end, people are still part of the B2B buying process. The Director of Purchasing of The Company acknowledges that a decision making factors may not all be rational. While it is true that B2B purchases aren't made on an impulse, organizations don't purchase things, people purchase things. Human decision making factors are still used (Soffer, 2017). Some of these factors may include if the solution will help the B2B customer perform their job better, impress a senior manager, or even a promotion (Soffer, 2017). The opposite could also be true: his job could become harder or different, he could fail to impress a senior manager, or he could lose that promotion.

Therefore, this will require the marketing to address rational, emotional, and technical aspects with messaging. The ability to connect with members of the decision making unit members will have an influence. Specifically, the greatest influence to making a purchasing decision is personal direct interaction. People will help move toward a buying decision more compared to other sources of information (Cespedes & Bova, 2015). One sales training expert concluded that when people connect with people that will become extremely effective at

influencing buying decisions (Sobczak, 2020). A customer can read about features and benefits on a website or product information sheets. But a person, a sales person, can learn more about the individual buyer to make a connection with a feature of a product that is meaningful to him and his position. The connection is a way to help the customer survive—either physical, emotional, or relational (Miller, 2017). Therefore, we can conclude that the sales person needs to know how to have impactful conversations, and marketing can help support those conversations with media (print or digital).

Another marketing tool to reach B2B customers is content marketing. Content marketing is a technique of creating and distributing information to a defined audience with the goal of creating interest or demand for a product or service (Steimle, 2016). Examples The Company uses today include emails to defined customer segments, videos, their website, and social media. The Company budgets about $400,000 a year for marketing activities which include tradeshows, website, advertising, print, digital and content marketing. Content marketing comprises approximately $20,000 (5%) a year of the total marketing budget. Tradeshows (38%) and advertising (28%) account for two-thirds of the entire budget. In 2017, companies on average spent 29% of their marketing budget on content marketing (Marsh, 2017). How much The Company should spend will depend on what content is needed to support sales people or strategic initiatives.

Content marketing fulfills part of the buying process by creating awareness and material used for customer's research (Steimle, 2016). Content marketing activities are usually deployed in systems to measure outcomes. Common measurements include emails opened, page views on a website, or number of views of a video.

There are mistakes made in content marketing. Some companies make the mistake of asking their sales people to create content marketing materials (writing a blog, for example) instead of completing traditional sales activities such as calling customers on the phone (Weinberg, 2019). The skills of a successful marketing person is different than a successful sales person, therefore, specialization will increase productivity (Roff-Marsh, 2015). When a worker performs activities of one type, they become very good at this activity. A sales training newsletter tells the story of a sales person conducting an experiment for two weeks (Richter, 2020). In the first week, this sales person posted on social media, interacted on blogs, and shared articles of value to others believed to be influencers in the buying process. The second week, this sales person made phone calls to customers, left voice mails, and spoke to customers. The first week resulted in no sales; the second week resulted in sales.

The sales person of the two week experiment concluded there was a need for the week one activities, just not by a member of the sales department. The specialized marketing person will become very good with writing, visual appearance, and creating attention. The specialized sales person will become good at asking questions, listening, and connecting at a person level.

Another mistake made in content marketing is the message itself. The prevailing belief was that companies needed to communicate their expertise, knowledge, or thought leadership to the industry. Customers do not want to know how smart a company is, but wish to be taught something new about their business and communicate a reason to change their current behavior (Spenner, 2017). An example of a better approach is to show what a customer is currently doing, then educate what they could be doing better with The Company's equipment or services.

Personalization of content can also be a mistake (Schmidt, Adamson, & Bird, 2017). Since an average of 5.4 may need to sign off on a B2B business purchase, styling a message to

one decision making unit (operations, engineering, or purchasing, for example) may limit the salesperson's influence. A tailored message to individuals may highlight different department goals or priorities instead of fostering consensus of the group. A better approach is connecting the customer's decision makers to each other and how The Company's product will help them all. Content created by marketing will support the unity of the customer's buying unit.

The best marketing content will add value (Steimle, 2016) to support the customer interactions. Content is best created by experts in the marketing field. Sales people will leverage the marketing content to influence decision makers.

A company's website is also a content marketing tool and perhaps the most common. The cost to build a B2B website can vary, but is estimated to cost anywhere from $15,000 to $80,000 (Williams, 2018). Websites are available 24-hours per day for customers to read, research, and connect with a company. The Company's Marketing Coordinator states the design of a website is important for good user experience which includes pages loading quickly, easy navigation, and updated digital assets (videos and pictures).

"Being found", the Marketing Coordinator, states, is one of the strategic goals of any website. Being found means when someone searches the internet for what The Company sells and seeing their products at the top of the internet search. The Marketing Coordinator says it's important to have "page one" internet search returns because most people won't look past the first page. The search engine joke is the best place to hide a dead body is on page two of an internet search.

Research done on page one results supports this search engine joke. One report shows 71% of search engine traffic clicks are page one results (Shelton, 2017). Second page shows only 6% of all website clicks. More research shows that even first page alone isn't good enough.

Of the first five results, 67.6% of all the website clicks occur (Sarcona, 2020). Page one results of 6 to10 account for only 3.73% of website clicks. Therefore, to be found on the internet, a company's website needs to perform as well by having high rankings. Search engine optimization (SEO) is the term used by marketing to return high search engine results (Shelton, 2017). SEO is a technique that utilizes keywords on a company's webpage to be found as natural or "organic" searches or through paid sponsored ads (Hawkins & Mothersbaugh, 2013). Search engine Google, used for 92.18% of all internet searches, changes their search algorithms frequently requiring marketers to constantly update their websites (Law, 2020). Research shows that customer's top two preferred content channels are search engine and a company's webpage when early on in the buying cycle (An, 2016).

SEO can be a time consuming and expensive activity. Companies can spend $5,000 or more per month (Steimle, 2015). Simple website changes can also help SEO such as fixing broken links, making frequent updates, making the site mobile friendly, linking and being linked to other credible websites, and content utilizing high ranking keywords (Shelton, 2017). Writing marketing content for a website using keywords can build a company's reputation and increases the likelihood of search engines finding a website (Khoo, 2020). The challenge for most companies is to have well written content that is created often to appear current and relevant to customers. All of which requires a strategic internet marketing plan and budget.

The Company's Marketing Coordinator states there is a desire to have more written content on the website. The written material would be used on the company blog and on social media. The Company doesn't have a professional copywriter resulting in poorly written and very few content pieces to use. The Marketing Coordinator states The Company has used third-party copywriters at the cost of $500 to $2,500 per content piece written. However, the use of this

third-party has been inconsistent and usually an afterthought. Many times what to write about is a challenge.

The Marketing Coordinator feels there is a lot of opportunity to improve, but feels overwhelmed with current workload. Moreover, coordinating sales and marketing efforts is needed. Marketing and sales working in concert will improve everyone's performance. Today, they seem to work independently. Moreover, The Company does not have a marketing plan, but works off high-level sales goals by doing things such as occasional marketing emails, advertising in trade magazines, and supporting trade show events. For the Marketing Coordinator, activities do not seem purposeful but rather reactionary.

Conclusions and Recommendations

The Company has sales goals, but they lack a strategic plan to achieve the goals. The recommendations forward will focus on the sales and marketing. A strategic plan will create a path or guide for how sales and marketing will work together, intentional activities, and metrics to measure progress. The Company is not proactive in its sales processes or marketing activities. For the people in sales and marketing, proposed changes to their job expectations may not be welcomed. Speaking to the DOA, it seems that the sales team will be the most resistant to any proposed changes. The Marketing Coordinator, however, is wishing for a plan instead of just doing "a lot of things". The Owner and President will have to be part of the strategic planning and support the plan. The Owner wants results, so his support is secure. The President has stated he wants results as well, but appears indifferent. The President will have welcomed input into a plan.

Employees of The Company have stated there is a tendency for initiatives to get sidetracked with newly "important" activities that may not be urgent. While it is common for

leaders to evaluate the market and what competitors are doing, the danger is stopping and starting new initiatives (Amabile & Kramer, 2019). Leaders need to allow enough time to determine if new initiatives are working. These new important activities generally come from the Owner and President. Department leaders in The Company feel they are unable to voice concern that the "new important" tasks will take away from other initiatives they are working on. The Owner and President will need to be receptive to employees speaking up on prioritizing work load. Based on interviews, the DOA, DOIT, Director of Purchasing and Marketing Manager are supportive of a strategic plan. The VPF seems to be indifferent to changes but is interested in how much new initiatives will cost as well as how to measure return on investment (ROI).

As with any change initiative, the employees of The Company will have the biggest impact of the success of the change. While most change initiatives need to have the buy-in of the top person in the organization, there also needs to be a guiding coalition (Kotter, 1996). A guiding coalition will include the influential people of The Company. Influential people will include department leaders, senior staff, and individual company experts. The employees recommended for the guiding coalition will include employees of the outside and inside sales, marketing, and IT. The guiding coalition will be instrumental in creating new processes, identifying training needs, and supporting the change through informal channels with other employees.

Marketing Changes

Marketing's primary goal is to create demand or interest for The Company's products (Strauss, 2016). Based upon a strategic plan to which CPG customers and targets to pursue, marketing can then create events, activities, and campaigns around these targets. The CRM will also include data on target customers The Company currently or used to do business with. The

current sales team are product experts and help guide customers to product solutions. What is missing in the marketing process are the people who will intentionally connect with prospects and reengage past customers. There is a need to create at least one or two new positions called Business Development Managers (BDM). A BDM is not closing a sale or a technical expert, but the person who will utilize the content marketing materials, phone prospecting, and engaging customers (Roff-Marsh, 2015). A BDMs role is to move a prospect down the sales process until there is a project opportunity to then hand the opportunity to a sales person. A metric for BDMs can include number of completed phone calls, project opportunities created, or sales dollars generated for targets in the strategic plan. The Company would need to hire a person who will have excellent communication skills. Sales conversation skills and techniques are an area a BDM will need to excel—an area today The Company does not have any experts.

Sales conversations when there isn't a project to talk about is a challenge for engineers. BDMs would specialize in this area. Training for BDMs to build and enhance conversations to help engage customers is needed. One sales trainer states sales conversations are a process, not an event (Orlob, 2019). A buyer's needs will change over time and a good BDM will need to treat conversations appropriately. Asking, "do you have any projects for us" is not going to build understanding of the customer as an individual, understand their goals, and how The Company might be able to help them. These conversations will take time to develop and will require planning.

Search engine optimization (SEO) is also an opportunity for The Company. Working with engineers, sales people, and BDMs, the Marketing Coordinator can identify industry keywords that The Company can leverage to improve search rankings. These keywords would be used in content marketing pieces either created by the Marketing Coordinator or a third-party

copywriter. The content marketing pieces would need to support the overall strategic plan of The Company. The Company should increase their budget for content marketing from its current 5% to 20% ($80,000). The content marketing pieces will serve in a number of ways on social media, BDM conversations, blog, and in the end improve SEO. Establishing metric goals for SEO will need to be established to measure progress. Measurements on website sessions, increased leads for target products, and sales of target products would be included. Establishing SEO goals and metrics will need to be done prior to executing.

Sales Team Changes

Needed changes in the sales team are helping them to complete the routine administrative tasks, embrace marketing as a partner to help, and to better equip them for sales conversations with customers. Introducing BDMs, according to the DOA, will cause a threat to sales people. The belief of the DOA is that sales people will feel threatened when someone else is talking to "their" customer and this will confuse customers. The DOA also states the sales people are concerned changes will impact their sales commission. Therefore, a vision for how The Company wishes to have more interactions with customers, increase engagement, and build trust will be needed. The BDMs will increase conversations and interactions. The sales people will have more time to work on opportunities once there is a project. Sales people would see no change in their commission. The goal for the BDMs will be to push more project opportunities to sales people which would increase their sales commissions. The BDMs would be fulfilling planned, targeted, sales prospecting conversations that are not happening today. The vision is that this would result in more sales for the sales people.

This new sales vision communication cannot be underestimated. Success for marketing and sales teams working together is critical for the sales changes to take place. Communicating

this vision as a group, then individually, and often is needed for the change to stick (Kotter, 1996). This will require communication on strategic vision and then another for individual job concerns (Hayes, 2010). Communication will create a shared direction, reduce disorder, uncertainty, and increase learning for employees (Hayes, 2010).

Customer Relationship Management (CRM)

Employees in The Company have both a love and a dislike for the CRM. The DOA feels the sales people don't care for it since it's just busy work with no added value. Marketing feels its data is needed to target content marketing pieces. The new BDMs will need the CRM to track conversations and schedule future conversations. A recommendation would be to pull the sales team, marketing, and IT to rediscover how the CRM can be an essential tool for individuals. The DOA has stated one area to improve the sales people's work is to incorporate routine data entry used in multiple areas once a quote proposal is needed. The DOA explains a sales person needs to fill out forms in three different areas that essentially requires them to type the same information over and over again. Working with IT and sales, creating an integrated quote initiation process out of the CRM would be value added. Customer name, contact information, specific customer build requirements, could all be housed in the CRM and allow the sales person to move quickly to generating a quote. Sales people agree having more information in one area, having less data entry, and having the ability to see history of past quotes is of value to them.

The recommendations above will create a cohesive work experience for both sales and marketing. Having clear and concise data available to all the parties in one place, the CRM, will effectively increase sales for The Company which is the long term goal.

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Table 1

Average number of Opportunities per month

Territory	**Year 2017**	**Year 2018**	**Year 2019**	**Year 2020**
AM 1	4.1	4.2	4.1	6.4
AM 2	10.3	11.7	9.3	9.6
AM 3	7.7	8.4	10.3	10.4
T 1	14.9	13.3	11.3	11.3
T 2	8.6	6.8	6.5	6.1
T 3	7.9	4.3	2.6	2.0
T 4	5.6	3.6	2.8	5.9
Totals	**59.0**	**52.3**	**46.8**	**51.7**
MCE 1	25.2	11.4	9.3	12.9

Table 2

Average Dollars of Opportunities per month

Territory	**Year 2017**	**Year 2018**	**Year 2019**	**Year 2020**
AM 1	$ 561,202	$ 516,637	$ 467,278	$ 739,279
AM 2	$ 616,375	$ 1,175,157	$ 929,871	$ 713,926
AM 3	$ 919,484	$ 789,511	$ 960,796	$ 1,009,560
T 1	$ 1,505,786	$ 1,342,672	$ 1,280,316	$ 1,326,551
T 2	$ 547,018	$ 784,909	$ 467,264	$ 351,973
T 3	$ 770,386	$ 237,617	$ 333,939	$ 227,557
T 4	$ 403,237	$ 416,466	$ 230,387	$ 1,015,040
Totals	**$ 5,323,488**	**$ 5,262,968**	**$ 4,669,850**	**$ 5,383,887**
MCE 1	$ 868,793	$ 458,370	$ 338,759	$ 569,258

Table 3

Common Size Average number of Opportunities per month

Territory	Year 2017	Year 2018	Year 2019	Year 2020	Totals
AM 1	7%	8%	9%	12%	9%
AM 2	17%	22%	20%	19%	19%
AM 3	13%	16%	22%	20%	18%
T 1	25%	26%	24%	22%	24%
T 2	15%	13%	14%	12%	13%
T 3	13%	8%	6%	4%	8%
T 4	9%	7%	6%	11%	9%
Totals	**100%**	**100%**	**100%**	**100%**	**100%**

Table 4

Common Size Average Dollars of Opportunities per month

Territory	Year 2017	Year 2018	Year 2019	Year 2020	Totals
AM 1	11%	10%	10%	14%	11%
AM 2	12%	22%	20%	13%	17%
AM 3	17%	15%	21%	19%	18%
T 1	28%	26%	27%	25%	26%
T 2	10%	15%	10%	7%	10%
T 3	14%	5%	7%	4%	8%
T 4	8%	8%	5%	19%	10%
Totals	**100%**	**100%**	**100%**	**100%**	**100%**

Table 5

Close Ratio of CRM Opportunities per Year

Territory	Year 2017	Year 2018	Year 2019	Year 2020	Totals
AM 1	59%	58%	63%	38%	55%
AM 2	43%	39%	42%	45%	42%
AM 3	49%	37%	41%	41%	42%
T 1	35%	38%	33%	22%	33%
T 2	52%	35%	49%	49%	46%
T 3	18%	37%	42%	64%	30%
T 4	19%	28%	44%	22%	26%
Totals	**39%**	**38%**	**42%**	**37%**	**39%**
MCE 1	41%	28%	39%	38%	37%

Table 6

Annual total Dollars Opportunities Selected Food Customers

Customer	Year 2018	Year 2019	Year 2020
Company A	$ 1,600,000	$ 555,000	$ 71,000
Company B	$ 1,700,000	$ 687,000	$ 289,000
Company C	$ 1,220,000	$ 423,000	$ 238,000
Totals	**$ 4,520,000**	**$ 1,665,000**	**$ 598,000**