

# Case study

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## Joined up sales and operations strategy establishes a new target client base to maximise short term profits

- One owner manager with a turnover of £4.5m
- In less than a year Menzies helped to establish a new target client base and maximise short term profits
- The sales and operations disputes were resolved to create a joined up strategy which resulted in new customer wins, that management predict will increase annual turnover by 14% and increase in profits of 100%.

### The issues

The management were concerned over the continuing disputes between the sales and operations teams over the type of new customer being targeted and ultimately won by the sales team. The sales team were trying to win new customers which were causing logistical problems for the operations team. Communications between the two teams had deteriorated to the extent that the sales team was becoming demotivated.

As a result, the return on investment of marketing and business development incurred by the business was declining and the business was struggling to achieve growth targets for sales and profit. Management attempted to resolve these problems without success and asked Menzies to assist.

### The solution

Menzies held interactive planning meetings where the senior managers of both teams and the managing director attended. Menzies facilitated an agreement on establishing the type of new customers the business should be winning and related this back to existing customers which met the agreed criteria. Menzies advised on the best way to approach the target customers and encouraged the teams to work together as one.

After overcoming initial teething problems, Menzies continued to advise the managing director on the importance of regular meetings with the teams to review their goals, progress and maintain focus on targeting new customers, meeting the agreed profile. The meetings enabled both teams to work more harmoniously together and build an improved culture within the business.

Menzies provided further advice to the managing director on how to motivate and develop the performance of the sales managers through regular communication and positive feedback against agreed benchmarks.

### The benefits

The sales team introduced seven new customers that fitted their target profile in the next quarter, resulting in a predicted 14% increase in annual turnover and 100% increase in profitability for the company. The sales team has also developed a higher quality pipeline of new target customers. Menzies is currently helping the management team review other aspects of their marketing and business development plan to maximise further sales and profit growth.

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Benefits which can be achieved from working with a trusted advisor, as in less than a year, Menzies helped to establish a new target client base and maximise short term profits.

### **Recommendations**

It is advisable that management teams view the types of ideal client they wish to target against the overall marketing and business development strategy, and help their teams to stay focused by holding regular meetings.

### **For further information, please contact:**

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