



## CASE STUDY EXAMPLES

by Rakesh Shah

### CASE STUDY No 1: DEVELOPMENT OF MARKET EXPANSION

The client was an engineering based company, who supplied engineering solutions into B2B industrial sectors. Sales revenue from the international market was declining, and the company had an ambitious growth plan, however no clear vision/idea as to where this growth was going to be achieved from.

Rakesh Shah (RVR Management) was recruited to develop a detailed plan, and to identify how the company could achieve its growth objectives. This then needed to be approved by the Board of Directors.

#### 1) TASK

A **strategic sales/marketing plan** was developed, which was presented to and approved by the Board. This focused on a number of initiatives, which were identified when developing the plan.

#### The process used:

- Key market drivers
- Key changes taking place in the market
- Which segment/countries are driving the growth
- Competitive analysis
- Market attractiveness model - this clearly identified where the client should focus his resources in order to achieve growth
- Resource allocation
- Areas of functional areas to improve
- VOC - voice of the customer survey

etc.

Based on a detailed plan analysis, it was identified that the company needed to focus on the following:

#### 2) INITIATIVES

- Digital marketing and communication
- Vertical market segment growth
- Geographical market expansion - by each region top 7 countries identified
- Channel development
- Key account strategy - by each segment - Top 20 accounts identified
- NPD - New product development

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## 3) EXECUTION

### Marketing

**Re branding** exercise undertaken - This was developed in form of a workshop - involving all the internal staff of the company. An external company was then given a brief to develop new logo/branding.

**VOC** - (voice of the customer) was carried out. This identified how the external customers viewed the business and areas of improvement/ product gap analysis.

**Digital Marketing Communication** - A detailed communication plan was developed/implemented (web site, SEO, social media, newsletter, blog, technical article, journal, news banner, trade association etc.)

**New brochure** based on total engineering capabilities, as well as ensuring it was vertical segment focused

**CRM** - building of a data base - using external agencies as well setting up of an internal telemarketing team was undertaken - to drive lead generation.

**Channel development** process introduced - This was to ensure the company identified the right types of agent/distributors for the target countries/segment.

**Online spares** - This was identified an area of growth and to generate incremental revenue

### Sales

Sales team re-organised based on region, ensuring resources where re allocated based on market growth/opportunities by country/segments.

New sales process introduced - e.g. effective call planning, product training, needs analysis questioning, key account management strategy, **daily management process introduced (i.e. number of leads/quote/orders closed /pipeline stage) etc.**

## 4) RESULTS/LEGACY

Introduced new visual management board to drive continuous improvement. Win rate improved by 10%

New lead generation/building data base - Pipeline value increased by 30%

New channel development process introduced/implemented, to add 20 new international distributors

Focus approach by sales/marketing team – showed a 15% improvement on order intake

Online spares revenue increased by 50%

New R/D department set up, and process introduced to define customer un-meet needs, 5 new potential ideas identified.

The company now on track to achieve its 3-year growth objectives, based on the current win rate/opportunity identified the company is likely to achieve its growth objectives within next 18 months

Client feedback

***“Rakesh was a very professional and committed member of the senior management team, whose contribution to the business was much valued and results there to be seen”*** Group CEO – C. Droogan

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## ***CASE STUDY No 2: Inside the assignment: RE-MARKETING and SALES DECLINE RECOVERY*** ***PUBLISHED BY EXECUTIVE GRAPEVINE***

*Rakesh Shah, founder of RVR management which focuses on providing Interim solutions for engineering/manufacturing sectors, explains how he managed to turnaround a manufacturing business that was experiencing a decline in its sales revenue.*

### **Brief**

The client was an engineering based company, who supplied instrumentation to a number of B2B based market sectors. The biggest issue for the client was that they were losing market share, and sales revenue was declining - down ten per cent from the previous year and approximately 15% the year before. Therefore, as a result a number of sales/marketing managers had come and gone.

The main brief was to recover the sales revenue for the business and to install some form of sales management process into the business. I was recruited for an initial period of three months, this then ended up being extended to 8 months

### **Execution**

The initial few weeks were spent examining the sales/marketing process. There was no clear strategy or measurement as to how the product would be marketed to the client target segment and no marketing communication plan was in place in order to generate new business.

Closer examination of the past sales history had showed up a very worrying trend. For the past five years approx 85% of business was coming from existing accounts and in this business, once equipment is purchased it is likely to last approximately 15-20 years.

**Priority 1** - Develop a detailed strategic growth plan for the business; which segment should the client be targeting, what types of accounts, how should the message be delivered, etc. Plus, a clear direction for the business, in terms of where are they now, where do they want to be and how are they going to get there.

**Priority 2** - Develop a detailed marketing plan; how should the product be marketed and what new features should be developed into the product that differentiates the clients and adds value to the end customer.

**Priority 3** - Focus on sales process, team building and improving product knowledge. Also introduced visual management board based on six sigma principles, which track /measured all the key data. The team were then given ownership to check/review the data and where appropriate carry out root cause counter measure in order to continuously improve/further develop the process.

**Priority 4** – Coach/train the team on benefits of six sigma process (e.g. carried out current state /future state map, Kiazen, QDIP boards, 5s etc...)

**Priority 5** – Coach/train the team on benefits of focusing on solution selling and taking more of a consultative approach to key accounts.

**Priority 6** - Develop a key account management strategy, with key focus on building relationships at all key levels within the business (i.e. key decision makers, and influencers etc.)

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## Legacy

The sales/marketing transformation programme generated improvements in the company's performance. The business achieved 21% growth versus the previous year and 26% growth versus the year before. Therefore, in the second half (32% growth v Q3 PY and 45% growth v Q4 PY) of the year the team recovered the decline from the first half of the year and exceeded the target for H2. Furthermore, the number of new leads/accounts introduced into the business increased by 30% and first quarter forecasts and pipelines are in line to achieve the top level stretch sales goal of 25% growth.

## Clients feedback:

"Rakesh was recruited as Head of Sales to review our sales structure/process within the UK. He introduced a number of initiatives/strategies which lead to developing/implementing a focused approach to sales process/pipeline management. The results delivered were beyond expectations driving strong growth in our equipment sales in the UK in the second half of the year." **M.Copper - FD**

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## **CASE STUDY No 3: SALES DEVELOPMENT / COACHING**

### **The Client**

A SME company based in Northamptonshire

### **The Challenge**

A couple of long standing, regular clients ceased trading which left the owner in need of finding new business. The MD felt his team were very reactive and no proactive activities were taking place. He was also not 100% clear in his mind in terms of the direction the business should be taking; as a result, the company had not seen growth in sales revenue, profit or customer retention.

### **The Solution**

Increase sales revenue and profitability of the business with a view to clearly identifying the target market, and then focusing specifically on growth strategies, plan and process, where by the company is taking a proactive approach.

### **Task**

- 1) Train, coach and facilitate the team in developing a detailed strategic market expansion plan
- 2) Train, coach and facilitate the team in developing a detailed marketing plan (including specific tactics to generate leads from the target market)
- 3) Sales training – Provided in depth training to the team, covering number of technique and tools e.g.- call planning, needs analysis, linking needs to feature of the product that will benefits the clients, handling objections etc...

### **Client Benefits/feedback**

“Rakesh helped us in number of key areas of our business. This included developing a strategic plan that provided us with a clear sales and marketing plan and strategy. This then enabled us to develop a business plan based on key market segments. Rakesh also undertook training/coaching of the sales team and put in place tools to assist with future sales development and customer retention. Rakesh also helped us to develop the concept of “value selling and total cost of ownership model” this has now enabled the team to articulate the key benefits of using some of our solutions. We are now starting to see signs of improvements in our business performance and sales conversion rate and we have continuously used the Rakesh approach/methods in order to develop our business further.

I would have no hesitation in recommending Rakesh and will look to use his service again in the future.”

**T. Mariani – Managing Director**

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## About the author: Rakesh Shah



GM, Sales, Business Development, Marketing and Commercial Director, 25+ years management experience of developing strategy/growing sales in UK/International (EMEA/SE Asia/ USA). Proven experience of helping organisations to grow incremental sales/profitability, develop new business, secure major orders, turnaround/transform poor sales performance business. Restructure teams to deliver growth, Develop/implement new strategy.

Sector Experience - B2B: automotive, oil/gas, nuclear, aerospace, rail, power, civil engineering, building material, Industrial, and not for profit, etc...

### Core skills:

1. Strategic Planning
2. Business Development (winning contracts from new/existing markets)
3. Sales, Marketing - Development/ Implementation of plan (inc pricing strategy, NPD, digital marketing, key account management etc)
4. Deliver business turnaround/transformation in SME as well as multinational PLC company
5. Team Leadership and Direction (e.g managing/working with team to deliver growth)
6. Installing & improving CRM systems, boosting commercial & marketing efficiency
7. Directing/leading change projects – focus is on systems, process and people

### Achievements:

1. Developed number of strategic plan –Increased sales by 20%.
2. Re align/motivate a failing sales/marketing team.
3. Introduced new visual management board -Sales win rate improved by 10%.
4. Introduced new focused approach to manage pipeline business and sales closure.
5. Secured £20m (£7m p/a) contract from a major oem account.
6. New channel/distribution development process to establish International distribution partners £800k revenue within first 3 months of roll out.

### Results:

- Sales Growth: Q3 achieved 32% growth versus Q3 PY. Q4 achieved 45% growth versus Q4 PY.
- Sales pipeline -Improved to deliver sales goal of 25% growth.
- New telemarketing process introduced - new accounts/new leads showing a 29% growth.
- WCT improved by 2 turns.
- OTD improved by 10%.

To view Rakesh Shah's short bio, please click [here](#)

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