

A photograph of a business meeting. In the foreground, a hand points at a tablet displaying a bar chart. Another hand is visible on the right, holding a pen over a document with various charts, including a pie chart and a bar chart. The background shows the hands of other participants in a professional setting.

Vector Firm Case Study: Dakota Security



Vector Firm Program: Sales & CRM Process

“Working with Chris laid the groundwork and set the foundation for implementing CRM into our organization - changing the way we pursue Sales and Marketing”

Micah Carlson
Vice President, Marketing

Executive Summary

In July, 2013 Chris Peterson of Vector Firm conducted an Interactive Review of the Dakota Security sales operations. There were four initiatives that were identified as high priority. Dakota made the decision to bring Chris into a retained engagement to work directly with their team in tackling three of these initiatives, most prominently aligning and optimizing their sales process among their four offices, helping Dakota Security take their organization the next level in sales.

Client Challenges

Dakota Security faced four specific challenges:

Corporate Sales Strategy and

Alignment: Decentralization was keeping the company's sales from powerful collaboration that comes with standardization. **CRM System**

Implementation: While Dakota's current system was very strong on developing leads and managing opportunities for reporting and dashboards, it provided little to no assistance in managing or growing client relationships, activity, or opportunity strategy. As a result, valuable client and opportunity information was not captured. **Sales**

Support Infrastructure: The sales people were spending a larger portion of their time on non-sales activity than was necessary, and Dakota had the revenue to justify a support structure.

How Vector Firm Helped

In September, 2013, Dakota and Vector Firm engaged in a retained agreement that included Vector's Sales & CRM Process. The first accomplishment was in creating a consistent sales process across the four offices. Although performance was strong, potential efficiencies were not being leveraged. A CRM system to manage the entire sales process was tailored and implemented. Winning buy-in from the team on a strategic targeting plan was very challenging, but it quickly illustrated positive results. Next was a modified the sales compensation plan and a sales on-boarding program, making them consistent across the company. Finally, a sales support structure was defined and personnel hired.

Results, Return on Investment and Future Plans

The results of the work performed by Chris and the Dakota team working together while implementing Vector's Sales & CRM Process can be measured in various ways, as summarized below.

- Every salesperson has increased their selling time with clients and prospects that best fit the Dakota ideal profile.
- The sales teams at all four regional offices are rowing in the same direction and leveraging the power of that comes with their numbers, increasing their efficiency and production.
- Management has easy access to activity and data that enables them to coach the sales people through the entire sales cycle, not just the closings for the month.
- Complete CRM Process from lead qualification to project closure, including the training of sales people on the utilization of the system.
- Four-Phase Sales On-Boarding Program built specifically for security integrator sales people. The outcome is a much quicker ramp-up in performance of new sales people.
- Sales compensation plan that is in parallel with Dakota's vision, short term goals, and culture.
- Sales Support Infrastructure that enables the sales people to spend more time selling.

In summary, Dakota's sales team now has the foundation and structure to continue to grow aggressively and take the business to the next level.

"More than just setting up software out of the box - Chris also layers in a strategic approach within CRM allowing us to execute on the strategy ... bringing on new sales people, re-engaging with existing clients and prospects it's all driven by a strategic direction and allows us to stay focused."

Micah Carlson

Vice President, Marketing