Gomo Consulting

Cisco Sales Enablement Data Lake and Scorecards

CISCO

Introduction

Cisco saw an opportunity to increase sales of their services offerings - technical support, installation services, consulting, etc. Cisco enacted several initiatives to enable and encourage product sales teams to include services offerings in proposals, and to include sales teams in "solution selling" motions.

Cisco created a 16-person sales enablement team to drive the changes in their global sales team of 23,000 sellers. The enablement team hired Gomo Consulting for both the business analysis of identifying metrics and designing scorecards, and also to manage the project of producing the scorecards.

The project was planned in 5 phases:

1. Metrics and scorecard design

2. Building the sales data lake

3. Building the scorecards

4. Driving adoption of the scorecards by sales management

5. Assessment of impact

Phase 1: Metrics and Scorecard Design

The goal was to increase services revenue - but revenue is a lagging indicator. In designing metrics scorecards for Sales Enablement, Gomo took an approach of working backwards from the end goal to identify leading indicators of future services revenue.

One key metric identified was attach rate - the percentage of product proposals that included technical support. Attach rate had never been measured - it had always been zero.

But attach rate wasn't leading enough. To verify that the sales teams were on track to achieve the aggressive goals set for attach rate and other key metrics, sales management wanted to see that the sales teams were trained properly, in the right timeframes. The training and content had largely been developed, but tracking consumption by the sales team had not.

The issue was that training data and content data were stored in two different systems. Worse, neither the Learning Management System nor the Content Management System tracked sets of content - they only tracked consumption at the individual asset level. The requirement Gomo defined was to reveal that a sales person had completed a course of training videos and had accessed a set of collateral and tools.

Another requirement was tracking completion and consumption of training materials by individual salespeople, and for the entire sales organization, and everything in between: teams, regions, geos, etc. The design called for reporting at 11 levels in the sales hierarchy.

Phase 2: Building the Data Lake

These requirements led the Sales Enablement team to request the creation of a data lake of sales enablement data. The owner of that project was IT; Gomo Consulting represented the enablement team as the analyst/project manager for building the data lake.

4 sets of data were to be merged: HR data, to capture the sales hierarchy; training data; content data; and CRM data. Inclusion of the latter data set opened the possibility of deeper analysis, such as correlating revenue growth with enablement programs.

The business decision for approving the data lake was anticipated and straightforward: sales management wanted the metrics, and they were only possible with consolidated data. The data lake was created within one quarter of project approval, delivered on time and on budget.

Phase 3: Building the Scorecards

Data visualization was a function also owned by IT; however, Gomo's role was to serve as scorecard designer, and to manage delivery of a full suite of scorecards for tracking enablement participation by sales.

To facilitate production and delivery of the scorecards, Gomo's analyst produced draft versions of the desired reports and scorecards using Cisco's standard data visualization system (Tableau). Those mock-ups were then replicated to work against the entire data set, for all levels of the sales hierarchy. In working hands-on with the visualization system, Gomo identified changes to the data model, errors in data consolidation, and refinements for tracking consumption in the LMS, CMS and CRM.

The project not only established scorecards for the near-term need of tracking adherence to services sales training; it also established a model for how future sales programs would be executed and tracked.

Phase 4: Driving Adoption of the Scorecards

The scorecards were to be used by all sales managers, globally. To facilitate global adoption, the scorecards were designed into the standard monthly and quarterly review processes that all teams followed for managing their business.

Driving adoption became its own enablement program - short training videos were created, guides were developed, online help written, and support services provided. The Gomo analyst participated in field visits to help select teams learn, use, and incorporate the scorecarding system into regular review meetings.

Phase 5: Assessment of Impact

3 key metrics were impacted by the Gomo project:

1. 6 months after launch, the percentage of global sellers who completed the enablement program exceeded the target goal by 8%

2. 6 months after launch, the attach rate goal was exceeded by 12%

3. For select teams, services pipeline revenue increased over 200% within 3 months of sellers completing the enablement program

About Gomo

Gomo Consulting is a specialty practice focused on delivering projects for our clients in the domain of go to market (i.e., Marketing and Sales). Our project managers and business analysts augment client teams to create alignment, develop plans, execute relentlessly, and deliver impact. Our disciplined approach has led to successful projects for clients such as Microsoft, Cisco, VMware, Avaya, PayPal, Visa, MongoDB, and many others.

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