



Developing an Effective, Repeatable Sales System in Two Software Companies

The Client: Ed Winder has enjoyed a long and successful career in high tech sales, marketing, and executive roles. He has worked with technology companies large and small, public and private. Currently he consults with select companies where he has equity interests. Winder first met Lisa Nirell while he was with Active Software and later engaged her when he was CEO at Tradec.

The Situation: Working in sales at Active Software, Winder recognized he had a problem. The company sold integration software which was in high demand and they were growing rapidly. They needed a systematic way to approach sales that would help the company generate more predictable revenue. "Our product was being marketed and sold in a very technical way. We needed to transition from a technical to a business sales culture and create repeatable processes so that we could grow," says Winder.

The Process: Lisa initially conducted a series of assessment interviews with the Active Software executive and sales teams. This helped her and Winder identify the biggest roadblocks to changing the sales culture. Through a series of Target Account Selling™ workshops, sales opportunity reviews, and accountability meetings over a one year period, she helped them develop an entirely new way of approaching sales. "The elements of the process were interesting," says Winder. "It entailed understanding who you're talking to in an organization, what's important to them personally and professionally, their industry dynamics, and the politics in their organization."

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Throughout the process, Lisa served as a sounding board for Winder. At times, he and his executive team struggled to convince their seasoned software engineers that thinking strategically was more important to the long term health of the company than focusing too heavily on features, price, and functionality. She also showed them a way to measure their progress against the stated goals on a monthly basis and celebrate their sales wins.

The Results: The new process brought the sales team together so that they were, as Winder says, "all on the same page." *Active Software* grew from \$1 million in sales annually to \$100 million in three short years. Winder says, of course, not all of that gain can be attributed to improving the sales process but says, "the underpinnings of our structure and organization were put into place with Lisa and the Target Account Selling™ methodology."

Winder Taps Lisa's Expertise a Second Time

Tradec was a small company (generating less than \$100K in annual sales) when Ed Winder became its CEO. Once again, Winder needed a system to attract new customers that was both effective and repeatable. He recalled Lisa's work at Active Software and brought her on board as a consultant. "I joined Tradec in late 2000. That was the beginning of a very rough period. But I did bring Lisa in to help me put in many of the same sales and marketing systems—this time, in a streamlined way," says Winder.

The process worked again. **The young company landed thirteen major accounts in a little more than two years.** "As a small organization we could compete effectively and win business. We were a pain the side of larger organizations," says Winder. "We landed names like Dell, IBM and Solectron. It would have been a foundation for long term success had we survived the environment at the time," says Winder. The tech landscape was indeed rocky in the early part of this decade. Ultimately *Tradec* was sold to a larger company.

Ed Winder on what it's like to work with Lisa: "What I value in Lisa is her ability to stay focused, to cut through all the things that may obscure the message and ask the crisp, clear questions. She's a master at it and I think her business reflects it. She is as good at *implementing* as she is at telling you *what ought to be done*. She's there, she's involved. She's fun to work with and always has a smile."

"If Lisa can do half of what she did for me for anybody else, I think they'd be pleased."

– Ed Winder

Ed Winder on when to call Lisa: "The time to call her is before you're in the ditch, before it's obvious that you're well off track. Don't call when it's too late. I don't know if there is any one right time - *anytime* is the right time."