NPI
Solidifying the Sales Process

With a mission to protect their clients from overspending in specific cost categories, NPI ensures that budgets go farther and yield more profit by offering their clients strategic sourcing expertise in information technology, telecom, and transportation spend management. Specializing in deep category knowledge, vendor-specific market intelligence, vendor-specific purchasing expertise, and a proven ability to identify gaps, NPI has optimized billions of dollars in complex spend for their clients.

NPI’s services are designed to make it easier for companies such as Canon, Equifax, Merck, Barnes & Noble, Sephora and American Family Insurance to achieve best-in-class sourcing in complex, opaque spend categories; guaranteeing savings.

The Challenges
NPI consultants and analysts are results-oriented and collaborative, proactively providing their clients with day-to-day interactions that are non-disruptive and effective. Jon Winsett, CEO at NPI, wanted to mirror this same effectiveness in NPI’s sales organization. “NPI had forged a new sales process a year previous to the Revegy implementation. We did a great job defining and adopting the process, but it wasn’t being used as deeply and consistently as we wanted it to be. We decided that full process adoption would be the next ‘sales excellence’ item we tackled.” NPI’s sales teams were already utilizing Salesforce.com on a daily basis, so the focus moved to driving increased effectiveness and efficiency.

Specific Challenges to Address
- More thorough and consistent adoption of the sales process
- Visibility into opportunities wasn’t deep enough, which resulted in a low win rate in the red zone
- Coaching efforts needed to be revamped to hold sales reps accountable with minimal interference in workflow

Challenges
- Lack of thorough adoption of sales process
- Poor visibility into red zone deals
- Informal coaching process

Solutions
Revegy Opportunity Management
Revegy Account Management

Results
- Increased visualization of the organizational structure at prospect accounts
- Effective coaching and communication between management and sales
- Improved forecast accuracy
Why Revegy: Through the Eyes of Management

Patrick Downey, NPI’s Director of Marketing Operations, had previous exposure to Revegy, so when NPI was in search of a tool that would address all their challenges Downey championed Revegy once more. “I knew we needed a tool that would give us an immediate return and integrate into our CRM, since our reps were already living there. I think back to other CRM integration efforts in my career and it was a huge expense and time investment. Revegy was out of the box simple for us to connect into SFDC and selecting a tool that was easy to implement was critical for us.”

NPI needed a tool that was going to help them ensure that all steps in the well-defined sales process were being followed and make it easier to see what had (and had not) been completed for each opportunity. Visual depiction of the client’s organizational stakeholders and their influence on the purchase decision also helped to expose risks early. Revegy’s Visual Maps and Sales Playbooks fit perfectly. “We started our Revegy project stating to our sales team that this is not a management tool – but rather a tool to help reps be more successful. Revegy allowed our sales reps to visualize the prospect’s organization and see the steps that needed to be taken to win the deal. The tools also enabled them to ask more questions and gain more insight into their prospects’ buying decisions,” Winsett added.

Why Revegy: Through the Eyes of the Sales Rep

Being in the sales business for 30 years, Derek Reed, Regional Sales Director at NPI, was skeptical about bringing in another tool that he felt would only benefit management. He didn’t see how inputting more information into another software application was going to help him. “When I went home, played with it, and put together a relationship map, I was surprised to see that all of the questions made sense, many I hadn’t even thought about or otherwise would have avoided. Revegy makes you think about the steps of the sale and holds you accountable for where you are in the sales process.”

Prior to Revegy, Reed, along with the rest of NPI’s sales team, rarely looked at the laminated paper sales process. Revegy provides a tangible way for NPI’s reps to walk through the steps inside an opportunity and makes the process come to life. “When you’re not following a process, you’re not consistently asking the right questions and then you’re surprised when deals don’t go your way. With Revegy if you do what you’re supposed to do, deals close. Period.”

Revegy also enabled NPI to streamline sales meetings by bringing facts into forecasting. No longer did they have to struggle with reps forecasting deals to close based on intuition. Reps were able to report on the progress of deals and management was able to use the information gathered in Revegy to better coach deals to close. This definitely helped the individual sales reps to see the value in the tool.