

ICSC Sales Management Case Competition Case Addendum for Finals

Following the First Meeting...

Heather called you late in the afternoon after your presentation and thanked you for all of your hard work. “My team and I are extremely impressed with your thoughts on developing a new prospecting and lead generation program here at Paycom. We discussed it afterwards and all agree that you need to share your thoughts with a few other sales leaders in our company. So if you don’t mind, could you please check your schedule and let me know when we could get together. The managers that you will be meeting with from Paycom are Thomas McNally, Matt Manley and Kevin Lynch. Our CEO has asked these Paycom sales leaders, along with me, to lead a strategic initiative committee on the Prospecting program. So if we move forward with your ideas, this is the team that will have to make it work and oversee the implementation of the program.”

You take a quick look at your calendar and mention that you are available in the morning of November 14th. Heather checks the schedules of the Paycom executives and confirms that everyone is available and shoots you a ZOOM link for the meeting. She closes the phone call by saying, “thanks again for the great ideas. I know that these other executive will enjoy hearing what you have to say. Feel free to throw in any other revelations that you might have between now and then.”

You thank Heather for the positive feedback and hang up the phone. “Time to polish up the presentation and think of any other ideas that we might want to cover with Heather and her team...”

The “Out of the Blue” Email...

Friday, November 13, 2020 was coming to a close and you and your consulting partner were wrapping things up and beginning to think about the rest of the evening at home. You were just about to close the screen on your laptop when you noticed an email from Heather drop into your Inbox. The email read...

“I am so sorry to have to send you this email but something has come up. I know you are probably all ready to go for tomorrow’s presentation but there’s something you need to know going into the meeting. It seems that Paycom’s marketing team has been working on a solution for our prospecting and lead generation challenges. None of us on the sales side knew about marketing’s efforts; you know how it goes, marketing and sales don’t always communicate as well as we should. Any way, marketing is ready to sign a contract with a company called “Sales Roads” (Salesroads.com) that is a 3rd party, lead generation company. I’ve only had time to take a quick look at their website, but it appears that they will work with us to help build a lead scoring system and then will use their phone screeners to call potential customers, qualify them on our services, and even set appointments on behalf of our sales people. Marketing knows that the CEO has pledged the \$2,000,000 for a new program. It believes that we should use these funds to hire Sales Roads and just turn all prospecting over to an outside company so our sellers can focus on the job of selling new clients and renewing existing clients. I know this is out of the blue, but I really need you to address the differences between your plan and just outsourcing to a 3rd party. Finally, marketing is feeling left out of this whole discussion, so if you think we should go with your original plan, can you make sure you cover the role of marketing in prospecting and lead generation going forward?”

This was a lot to take in and you notice the email closes with one more small surprise. Heather wrote, “One other wrinkle about tomorrow. I won’t be able to make it to the meeting, so keep in mind that you are presenting to a team that hasn’t seen your presentation before. But I know you and your partner are both pros and will do great! Good Luck!”