



THE SITUATION

Poly has an addressable market potential of \$10.3B+. In order to capture a share of the opportunity, the existing sales team had to be more efficient and align efforts to FY21 priorities. By executing a project around optimizing the global inside sales team (including the Marketing Development Team) and improving renewals and upgrades represented an opportunity of an additional \$88M+ in incremental bookings through FY22.



OPPORTUNITY

There was an opportunity to improve productivity per head within the inside sales team through improving processes and designing an org and coverage model more aligned to market opportunity. Also, leveraging new sales plays, campaigns, and analytics was necessary to unlock the full potential of the Poly install base.

Levers Pulled:

- › Recommended inside sales coverage model
- › Inside Sales Long Term Recommendations & Plan
- › Improved Inside Sales Processes (e.g., Lead Routing)
- › Improved employee experience and role clarity through metric tracking & de-corruption of roles



SBI RESPONSE

- › **Inside Sales Coverage Model**
 - Recommended coverage model to drive an improved CX through more efficient org design, headcount and RACI model. **\$39M-\$97M¹** impact through more efficient org design, better coverage, and improved employee + customer experience
- › **Inside Sales Talent**
 - Improved employee experience and role clarity through metric tracking and de-corruption of roles. Recommended improvements in Talent Strategy. **\$39M-\$97M¹** through role de-corruption, reduced turnover, and clarified responsibilities
- › **Inside Sales Process & Metrics**
 - Defined processes for lead routing. Intent is to increase sales velocity due to better understanding of end-to-end lead process. **\$13M-\$22M²** impact through sales velocity increase, visibility of end-to-end opportunity management, faster response to customers
- › **Inside Sales Long Term Recommendations & Plan**
 - Prioritized three recommendations for optimizing Inside Sales and MDT with associated Execution Plan. Objective is to improve productivity. **\$92M-\$216M³** impact through completion of step-by-step guide to implement recommendations and improve productivity



RESULTS

\$39M-\$97M

Cost Saving Efficiencies Identified

\$92M-\$216M

Incremental Revenue Opportunity

7-12%

Expected Improvement in Rep Productivity



THE SITUATION

How can Genesys improve margins and optimize investment while operating in an increasingly competitive market?

Recently acquired, the new parent company identified that sales and marketing capabilities were not positioned to drive growth.

Talent levels were performing below industry benchmarks in many areas, with reps not being exposed to industry best practices.

Major competitive industry players (i.e. CISCO & Avaya) were taking market share from the top end of the market.

Cloud players, like Interactive Intelligence, were disrupting the market at the lower end.



OPPORTUNITY

Rapidly incorporate best practices and emerging best practices into Genesys's sales and marketing operations. SBI benchmarked each sales and marketing function:

- › Buyer Personas and Pricing Optimization
- › Account Segmentation, Territory Design
- › Talent Management (reps, managers, pre-sales) and Compensation Planning
- › Custom Sales Process and Lead Management
- › Sales Manager Training, Sales Rep Academies and Worldwide sales Coaching

SBI's key findings included:

- › Proposed change is transformative. Genesys ownership, leadership, and management must feel their input is considered to own recommendations
- › Rapid pace required given timeline and current state



SBI RESPONSE

Prioritized functional and cross-functional strategy implementation - SBI determined the best practices and rapidly implemented them to achieve the greatest ROI within the existing business constraints

Focused on offerings with the highest probabilities for providing maximum returns:

- › Strategic product revenue
- › Maintenance revenue
- › New license revenue

Operationalized best practices:

- › Genesys now had accountability in chosen sales and marketing strategies
- › Positioned Genesys to develop ongoing state-of-the-art sales and marketing knowledge.



RESULTS

2X

Improvement in total enterprise value