BEST PRACTICES & EFFICIENCY IMPROVEMENTS

Detailed Recommendations Based on Data Analysis

🎯 RECOMMENDATION #1: FIX DATA INFRASTRUCTURE (CRITICAL)

The Problem:

Only 19% of Key Accounts can be linked to time records. This is a **"garbage in, garbage out"** situation.

Root Cause:

Orphaned Data Syndrome

- Different people enter data in different sheets

- No unique company/project IDs

- Inconsistent naming (e.g., "CRN Architects" vs "crn architects" vs "CRN Architect")

- No validation at data entry point

Best Practice Solution:

Short-Term Fix (Implement in 2 Weeks):

A) Create Master Company List

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Step 1: Extract all unique company names from all 4 sheets
Step 2: Manually deduplicate and assign unique IDs
Step 3: Create dropdown list in Excel/Google Sheets
Step 4: LOCK company name entry to dropdown only (no free text!)
```

B) Implement Data Entry Standards

- **Rule 1:** Every activity MUST have: Company ID, Project ID, Date, Hours

- **Rule 2:** Meeting notes go in designated column (not mixed with company names)

- **Rule 3:** Weekly audit by team lead to catch errors early

Long-Term Fix (Implement in 3 Months):

Implement CRM System (Salesforce, HubSpot, or Zoho)

Why CRM?

- ✅ Auto-linking: Company → Contacts → Activities → Deals
- ✅ Mandatory fields: Can't save record without required info
- ✅ Standardized dropdowns: No typo variations
- ✅ Real-time dashboard: See metrics instantly
- ✅ Mobile app: Log activities on-the-go

Expected ROI:

- Data quality: 19% → 95%+ match rate
- Time saved: 5 hours/week on manual reconciliation
- Better decisions: Real-time visibility into pipeline

🎯 RECOMMENDATION #2: REACTIVATE DORMANT VIP ACCOUNTS (HIGH PRIORITY)

The Problem:

34 out of 42 Key Accounts (81%) have ZERO recorded engagement.
These represent 55+ target BOQs just sitting there.

Why This Happened:

- Salesperson got distracted by easier/smaller accounts
- No accountability system for VIP engagement
- Forgot about some accounts over time
- No automated reminders

Best Practice Solution:

Immediate Action (Week 1-2):

A) VIP Account Audit

> For each of the 34 dormant accounts:
> 1. Research: Are they still in business? Changed contact?
> 2. Reason: Why no contact? (lost info, rejected us, forgot?)
> 3. Priority: Sort by target BOQ value (high to low)
> 4. Assign: Give each account to a specific salesperson

B) 30-Day Reactivation Campaign

Long-Term System (Month 2+):

Implement Account Management Discipline

Rule: Each VIP account must have:

- ✅ Assigned owner (can't be "team" - must be ONE person)

- ✅ Minimum 1 touchpoint every 30 days

- ✅ Quarterly business review (even if no active deal)

- ✅ Documented next steps after every interaction

Tracking System:

```
Create simple tracker:
| Account Name | Owner | Last Contact | Days Since | Next Action | Status |
|--------------|-------|--------------|------------|-------------|--------|
| Design Tree | Niranjan | Nov 15 | 27 days | Send Q1 proposal | Active |
| Gensler    | Niranjan | Aug 10 | 124 days | URGENT: Reconnect | Dormant |
```

Accountability:

- Weekly team meeting: Each person reports on VIP engagement

- Red flag if any account goes >45 days without contact

- Quarterly bonus tied to VIP engagement rate

Expected Results:

- Engagement rate: 19% → 80%+ in 90 days

- New opportunities: 10-15 deals from dormant accounts

- Revenue potential: ₹50-100M additional pipeline

🎯 RECOMMENDATION #3: UNSTICK FROZEN DEALS (HIGH PRIORITY)

The Problem:

20 deals worth ₹132M stuck in "Commercial Review" stage.
Average time in pipeline: 400+ days (industry norm: 90-180 days)

Why Deals Get Stuck:

From research, common reasons:

- Waiting for customer budget approval

- Price negotiations dragging

- Competitor offering better terms

- Internal champion left the company

- Project put on hold, but not officially cancelled

Best Practice Solution:

Immediate Intervention (Week 1-2):

A) Deal Triage Protocol

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For each of the 20 stuck deals:

Category 1: DEAD (Kill it)
- No contact in 90+ days despite attempts
- Customer explicitly said "not now"
- Action: Mark as LOST, document reason, move on

Category 2: STALLED (Push hard)
- Waiting on customer internal approvals
- Price negotiation ongoing
- Action: Escalate to senior management, offer incentive

Category 3: SLOW (Nurture patiently)
- Long buying cycle expected
- Multi-stakeholder approval needed
- Action: Maintain monthly contact, provide value
```

B) Create Deal Velocity Dashboard

Long-Term Prevention (Month 2+):

Implement Deal Management Discipline

Stage-Gate Process:

Introduction → Qualification → Proposal → Negotiation → Close

At each gate, answer:
1. What's the customer's timeline?
2. What's blocking progress?
3. What's our next action?
4. When's the next meeting scheduled?

Can't move forward without answering these!

Weekly Deal Review:

- Every Monday: Review all deals >30 days old

- Assign owner to "unstick" each blocker

- Follow-up Friday: Check progress

Deal Closure Incentive:

- Bonus for closing deals quickly

- Penalty for "zombie deals" (alive but not progressing)

Expected Results:

- Deal velocity: 400 days → <180 days in 6 months

- Win rate: 5% → 15-20%

- Revenue closed: ₹20-40M from currently stuck deals

🎯 RECOMMENDATION #4: OPTIMIZE TIME ALLOCATION

The Problem:

- 39% of time on "Unknown" + "Admin" tasks

- Only 19% of time going to VIP accounts

- Time wasted on 131 non-VIP, low-value accounts

Best Practice: 80/20 Rule (Pareto Principle)

Current State:

> Time Allocation:
> - Developer category: 39% of time
> - Consultant category: 29% of time
> - Unknown: 11% of time
> - Admin: 7% of time

Recommended Target State:

> Time Allocation:
> - VIP Accounts (42 companies): 60% of time
> - High-potential prospects: 25% of time
> - Admin/Internal: <5% of time
> - Exploration/Networking: 10% of time

Best Practice Solution:

A) Implement ABC Account Classification

A Accounts (VIP): 42 companies
- Target: 60% of time (300+ hours/month)
- Minimum: 1 meeting/month per account
- Owner: Senior salesperson only

B Accounts (High-potential): 30-40 companies
- Target: 25% of time (125 hours/month)
- Minimum: 1 meeting/quarter
- Owner: Mid-level salesperson

C Accounts (Maintenance): Remaining companies
- Target: 10% of time (50 hours/month)
- Minimum: Email/phone only
- Owner: Junior salesperson or inside sales

D Accounts (Deprioritize): Low-value, no recent activity
- Target: 0% of time
- Action: Remove from active list, auto-nurture campaign

B) Time Blocking System

Monday-Wednesday: VIP Account Days
- Morning: Meetings with A accounts
- Afternoon: Proposal work, follow-ups

Thursday: Pipeline Management
- Morning: Review all deals, unstick blockers
- Afternoon: Team meeting, planning

Friday: Prospecting & Admin
- Morning: Reach out to B accounts
- Afternoon: CRM updates, reporting

C) Reduce Admin Overhead

Current admin time: 34.5 hours (7.2%)
Target: <25 hours (5%)

How:

1. **Automate Reporting**
   - Use CRM auto-reports instead of manual Excel
   - Save: 5 hours/month

2. **Delegate Data Entry**

- Hire part-time admin to enter meeting notes
- Save: 3 hours/month

3. **Streamline Meetings**

   - Internal meetings: 30 mins max, agenda required
   - Save: 2 hours/month

Expected Results:

- VIP time allocation: 19% → 60%
- Admin time: 7.2% → <5%
- Freed capacity: 40-50 hours/month for selling

🎯 RECOMMENDATION #5: IMPLEMENT ACTIVITY-TO-REVENUE TRACKING

The Problem:

Cannot answer: "Which activities actually lead to closed deals?"

Why This Matters:

- Maybe site visits close more deals than office meetings?
- Maybe techno-commercial discussions are a waste of time?
- Maybe introduction pitches should be shorter?

You can't know without data!

Best Practice Solution:

Create Activity Effectiveness Framework

Track for Each Activity Type:

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Activity Type: Site Visit
- Total count: X activities
- Hours spent: Y hours total
- Deals influenced: Z deals
- Win rate: Z/X = _%
- Revenue per hour: Total deal value / Y hours
- Efficiency score: Rank 1-10
```

Example Analysis:

Activity: Introduction Pitch

- Count: 50 activities

- Hours: 50 hours (1 hour each)

- Deals influenced: 5 deals

- Conversion rate: 10%

- Avg deal value: ₹10M

- Revenue per hour: ₹1M/hour

→ VERDICT: Efficient, keep doing!

Activity: Techno-Commercial Discussion

- Count: 100 activities

- Hours: 300 hours (3 hours each)

- Deals influenced: 8 deals

- Conversion rate: 8%

- Avg deal value: ₹8M

- Revenue per hour: ₹213K/hour

→ VERDICT: Less efficient, need to shorten or improve quality

Implement "Activity Playbook"

Based on analysis, create rules:

Stage 1 (Introduction):
- Best activity: 30-min intro call
- Goal: Qualify opportunity
- Success metric: Meeting scheduled

Stage 2 (Discovery):
- Best activity: Site visit + needs assessment
- Goal: Understand pain points
- Success metric: Problem statement documented

Stage 3 (Proposal):
- Best activity: Techno-commercial presentation
- Goal: Present solution
- Success metric: Proposal submitted

Stage 4 (Negotiation):
- Best activity: Pricing discussion + demos
- Goal: Address objections
- Success metric: Verbal commitment

Stage 5 (Close):
- Best activity: Contract review + sign-off
- Goal: Get signature
- Success metric: PO received

Expected Results:

- Know which activities work best at each stage

- Eliminate low-value activities

- Increase win rate by 5-10%

- Reduce time wasted on ineffective tactics

🎯 RECOMMENDATION #6: IMPLEMENT LOST DEAL ANALYSIS

The Current Gap:

Lost Reason tracking: 100% missing (0 out of 24 deals have documented loss reasons)

Why This is Critical:

You learn MORE from losses than wins!

- Did we lose on price? → Need better cost justification

- Did we lose on features? → Product gap to address

- Did we lose on timing? → Better qualifying needed

- Did competitor win? → Need competitive intelligence

Best Practice Solution:

Mandatory Loss Analysis Process

When a deal is marked "Lost", MUST answer:

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1. Primary loss reason (pick one):
   □ Price too high
   □ Product didn't meet needs
   □ Competitor won
   □ Budget disappeared
   □ Project cancelled
   □ Lost contact with champion
   □ Timeline too long

2. Competitive intel:
   - Who won? (competitor name)
   - Why did they win? (what was their edge?)
   - What could we have done differently?

3. Lessons learned:
   - What warning signs did we miss?
   - What should we do differently next time?

4. Relationship status:
   - Door closed forever? Or future opportunity?
   - Should we stay in touch?
```

Quarterly Loss Review Meeting

Every quarter, team reviews all lost deals:

- Identify patterns (losing 80% on price? That's a trend!)

- Update sales playbook based on learnings

- Share competitive intelligence across team

- Celebrate "good losses" (learned valuable lessons)

Expected Results:

- Reduce repeat mistakes

- Better competitive positioning

- Improved qualification (don't chase unwinnable deals)

- Win rate improvement: 5% → 15-20% over 12 months

📊 IMPLEMENTATION ROADMAP

Phase 1: Foundation (Month 1-2)

Priority: CRITICAL

Week 1-2:
✓ Create master company list with unique IDs
✓ Audit 34 dormant VIP accounts
✓ Triage 20 stuck deals into categories

Week 3-4:
✓ Implement dropdown-based data entry
✓ Launch VIP reactivation campaign (top 10)
✓ Set up deal velocity dashboard
✓ Start tracking lost deal reasons

Phase 2: Optimization (Month 3-4)

Priority: HIGH

Week 5-8:
✓ Implement ABC account classification
✓ Roll out time blocking system
✓ Continue VIP reactivation (next 20)
✓ Establish stage-gate deal process
✓ First quarterly loss review

Phase 3: Automation (Month 5-6)

Priority: MEDIUM

Week 9-12:
✓ Select and implement CRM system
✓ Migrate all data to CRM
✓ Create activity effectiveness framework
✓ Build automated reporting dashboards
✓ Train team on new processes

💰 EXPECTED ROI

Investment Required:

CRM system: ₹50,000 - ₹200,000/year

Part-time admin: ₹15,000/month = ₹180,000/year

Training & setup: ₹50,000 one-time

Total Year 1: ₹280,000 - ₹430,000

Expected Returns (Year 1):

From VIP reactivation: 10-15 new deals @ ₹5M avg = ₹50-75M

From unstuck deals: 3-5 closures @ ₹10M avg = ₹30-50M

From improved win rate: 5% → 15% on ₹150M pipeline = ₹15M additional

From time efficiency: 50 hours/month freed × ₹3,500/hour = ₹2.1M/year

Total Expected Value: ₹97-142M

ROI: 340-500x return on investment

📈 SUCCESS METRICS (Track Monthly)

Data Quality Metrics:

☐ Company name match rate: Target 95%+

☐ Missing data %: Target <5%

☐ Duplicate entries: Target 0

Account Management Metrics:

☐ VIP engagement rate: Target 80%+

☐ Time on VIP accounts: Target 60%+

☐ Dormant accounts: Target <10%

Deal Management Metrics:

☐ Average deal cycle: Target <180 days

☐ Win rate: Target 15-20%

☐ Deals >90 days old: Target <5

Efficiency Metrics:

☐ Admin time %: Target <5%

☐ Hours per closed deal: Track trend

☐ Revenue per activity hour: Track trend

✅ QUICK WINS (Can Implement This Week)

1. Create Simple Tracker (1 hour)

Excel sheet with columns:

| Account | Owner | Last Contact | Days Since | Next Action | Due Date |

2. Schedule VIP Check-ins (2 hours)

Put recurring calendar reminders:

- 1st of month: Review all VIP accounts

- 15th of month: Follow up on pending actions

3. Daily Stand-up (15 mins/day)

Every morning, team answers:

- What deals did I move forward yesterday?

- What's blocking me today?

- What's my #1 priority today?

4. Start Loss Tracking (Immediate)

Create Google Form:

"Deal Loss Report"

- Deal name

- Loss reason (dropdown)

- Competitor who won

- Lessons learned

- Future opportunity? (Yes/No)

🎓 LEARNING & BEST PRACTICES SUMMARY

Key Principles:

1. **Measure Everything**
   - You can't improve what you can't measure

- Even imperfect data > no data

2. **Focus on the Vital Few**

   - 80/20 rule: 20% of accounts = 80% of revenue

   - Ruthlessly prioritize VIP accounts

3. **Learn from Losses**

   - Lost deals teach you more than wins

   - Systematic loss analysis prevents repeat mistakes

4. **Process Over Heroics**

   - Don't rely on individual heroics

   - Build systems that work even when you're not watching

5. **Simplicity Wins**

   - Start with simple Excel tracker

   - Graduate to fancy CRM later

   - Simple system used daily > complex system ignored

Avoid These Common Mistakes:

❌ **Don't** merge bad data and pretend it's good ✅ **Do** acknowledge data quality issues and fix root cause

❌ **Don't** chase every opportunity ✅ **Do** focus on high-value VIP accounts

❌ **Don't** let deals sit forever ✅ **Do** force decision: escalate or kill zombie deals

❌ **Don't** wait for perfect data ✅ **Do** start improving with what you have

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📞 NEXT STEPS

For Immediate Action:

1. **Approve** recommendations #1, #2, #3 (critical priority)

2. **Assign** owners for each recommendation

3. **Schedule** weekly progress reviews

4. **Budget** for CRM system and admin support

5. **Communicate** changes to entire sales team

For Further Discussion:

- Which CRM system best fits Genotek's needs?

- Should we hire dedicated sales operations person?

- How to incentivize VIP account engagement?

- Training needed for team on new processes?

These recommendations are based on analysis of 4 data sheets covering Feb-Nov 2025, industry best practices research, and critical thinking about root causes vs. symptoms.

- Should we hire dedicated sales operations person?

- How to incentivize VIP account engagement?

- Training needed for team on new processes?