

**BASELINE**  
**COMPANY**

# Advisors Income Overview from The Baseline Company

Accelerating Client Engagements at Value-based Realization Rates

[www.TheBaselineCompany.com](http://www.TheBaselineCompany.com)

# Background and Value

- Pepperdine and UCLA - Industry Experts
- Clients include Sony, Disney, Caterpillar, Cargill and thousands of 20 person organizations
- Rebranding our 15 Year History
  - ✧ Adding New products
  - ✧ Aggressive Marketing (Selling Power White Paper 800 downloads!)
  - ✧ Training Consultants on an expanded “Usage” Model
    - Use as marketing tool for your business
    - Use in your sales process to accelerate client acquisition
    - “Value Sell Everywhere”
    - Bundle with Services for \$700/hr Realization
    - They create foundation to launch additional engagements

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# Advisor Benefits

	<u>Baseline Family</u>
▪ Accelerates client acquisition	X
▪ Creates standalone revenue	X
▪ Compliments your present services	X
▪ Easy for clients to see value i.e. Quality Output/Deliverable	X
▪ Short Sales Cycle – less than 30 days, less than 3 calls/appointments	X
▪ Implementation pain free i.e. results in days not weeks/months	X
▪ No restrictions on sales territory i.e. sell nationwide	X
▪ Deliver solutions nationwide without significant travel/expense to client	X
▪ Capable of generating additional engagement revenue if desired	X
▪ Has recurring revenue potential	X
▪ You control sales price (value pricing)	X
▪ You do all client billing	X

# Program Overview

- Four Primary Baselines
  1. Board Baseline (Governance)
  2. Leadership Baseline
  3. Business/Organization Baseline
  4. Departmental Baselines
    - Sales Baseline (Organizational not behavior/personality)
    - Finance, IT, HR and others Under Development
- Industry Specific Versions
  - ✧ Not-For-Profit – Education - Government
- Multi-Level Respondents – Board, Management, Employee

# The life and (difficult) times of consultants

Travail -

- noun 1. painfully difficult or burdensome work; toil. 2. pain, anguish or suffering resulting from mental or physical hardship.

# The life....

- Time to win
  - ✧ Pre-engagement meetings a necessary evil
- Tough to win
  - ✧ Who are you?
  - ✧ What will it be like to work with you?
  - ✧ What's your deliverables like?
- When you do win....
  - ✧ Go to work
- Geographic restrictions
  - ✧ Marketing
  - ✧ Delivering

# Lead with Sales Baseline

- Why? In a room of 10 executives, more will be interested in driving revenue growth than organizational or leadership initiatives.
- Lead with how you can help with revenue and follow with your other services
- You do NOT have to be a SME in sales – that is why you use the baseline!

# Sales Baseline Assessment Process

- Step back for 20 minutes and survey the madness objectively
- Identify your capabilities and constraints – and pinpoint strategic areas for improvement.





# Standard Reports for All Baseline Products

**Scores**

**Report Card**

**Ranking**

**Constraints**

**Impact Results**

**Comparison**

**Sales Performance Index - SPI**

**Capabilities**

**SPI Benchmark**

No.	Category	Score
1	Staff Performance	62%
2	Sales Management	48%
3	Market Planning	49%
4	Prospecting & Qualification	59%
5	Sales Processes	62%
6	Compensation	62%
7	Infrastructure	
8	Mkt Initiatives	
9	Bus. Mgmt	
10	Prof Svcs/Proj Mgmt	
11	Sales Training	

Statement	No.	NA	DK	FREQUENCY OF RESPONSE				
				1	2	3	4	5
1 Our marketing staff understands the business drivers in our markets.	All	0%	0%	12%	38%	38%	12%	0%
2 We have thoroughly defined our various target markets.	All	0%	0%	20%	40%	30%	10%	0%
3 We have an "ideal client profile" which is used by the sales team in identifying prospects in each market.	All	0%	0%	0%	87%	0%	13%	0%
4 We prepare an annual marketing plan.	All	0%	0%	0%	100%	0%	0%	0%
5 We revise our marketing plan as needed during the year.	All	0%	0%	0%	100%	0%	0%	0%
6 We have a current social media strategy.	All	0%	0%	0%	0%	0%	0%	0%
7 We report key Marketing indicators to the staff.	All	0%	0%	0%	0%	0%	0%	0%

**2013 Sales Baseline**  
Prepared By: J.R. Samples on 5/26/2012

**Quadrant Sales Performance SPI Comparison**

Bottom 10%: 53% | Mean: 67% | Top 10%: 63% | YTD: 56%

**2013 Sales Baseline**  
Prepared By: J.R. Samples on 5/26/2012

**Capabilities and Constraints Definitions**

Capabilities are defined as those service categories that are view as "High-Impact" (important) and "High-Performance" (highly perceived as satisfactory performance).

Constraints are defined as those service categories that are view as "High-Impact" (important) and "Low-Performance" (less perceived as satisfactory performance).





Your Sales Performance Index™:

56

Your Prior Year SPI™:

N/A

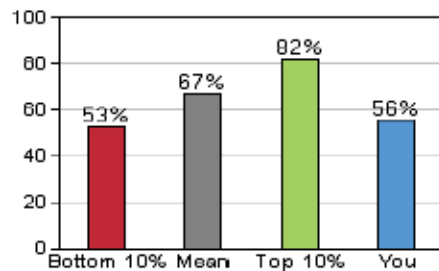
Capabilities

Sales Statements	
Staff Performance	62%
Prospecting & Qualification	59%
Sales Processes	62%

Constraints

Sales Statements	
Sales Management	48%
Market Planning	49%

QuadSales Benchmark SPI Comparison



Total Distribution: 8  
Percentage: 100%

Total Participants: 8

Group Name	Participants
Sales Staff	4
CEO	1
Management Staff	3

Capabilities and Constraints Definitions

Capabilities are defined as those service categories that are view as "High-Impact" (important to the customer) and "High-Performing" (generally perceived as satisfactory performance).

Constraints are defined as those service categories that are view as "High-Impact" (important to the customer) and "Low-Performing" (generally perceived as less satisfactory performance).



# QuadStrat Enterprise (Sales Edition)

Degree Of Impact Results

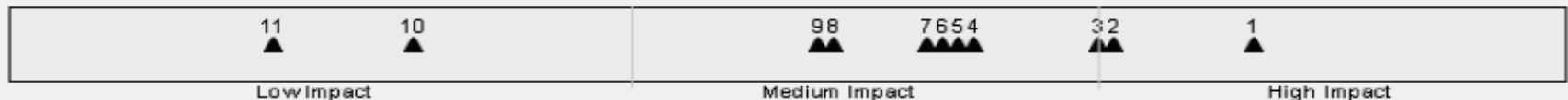
Sales Statements



All Participants		
No.	Category	Score
1	Staff Performance	62%
2	Sales Management	48%
3	Market Planning	49%
4	Prospecting & Qualification	59%
5	Sales Processes	62%
6	Compensation	62%
7	Infrastructure	51%
8	Mrkt Initiatives	60%
9	Bus. Mgmt	61%
10	Prof Svcs/Proj Mgmt	60%
11	Sales Training	42%

- Primary Objective: Improve scores of High Impact - Low Score and High Impact and High Score categories

This chart illustrates the actual spacing of the elements on the Impact axis.





# QuadStrat Enterprise (Sales Edition)

## Performance Scores

NA: Not Applicable DK: Don't Know 1: Strongly Disagree 2: Disagree 3: Somewhat Disagree 4: Somewhat Agree 5: Agree 6: Strongly Agree



Not Applicable Don't Know Disagree Agree

### Market Planning

Item	No.	FREQUENCY OF RESPONSE						Post. Score	Mean Score	Std. Dev.	Mean Score	Std. Dev.				
		NA	DK	1	2	3	4						5	6		
1 Our marketing staff understands the business drivers in our markets.	All	8	0%	0%	13%	38%	38%	13%	0%	0%	0%	42%	15	All	49%	17
	Sales Staff	4	0%	0%	25%	0%	75%	0%	0%	0%	0%	42%	16	Sales Staff	48%	16
	CEO	1	0%	0%	0%	100%	0%	0%	0%	0%	0%	33%	0	CEO	55%	22
	Management Staff	3	0%	0%	0%	67%	0%	33%	0%	0%	0%	44%	19	Management S...	49%	16
2 We have thoroughly defined our various target markets.	All	8	0%	0%	0%	50%	38%	0%	13%	0%	13%	46%	17			
	Sales Staff	4	0%	0%	0%	50%	50%	0%	0%	0%	0%	42%	9			
	CEO	1	0%	0%	0%	0%	0%	0%	0%	100%	0%	83%	0			
	Management Staff	3	0%	0%	0%	67%	33%	0%	0%	0%	0%	39%	9			
3 We have an "Ideal Client Profile" written to assist the sales team in identifying prospects in each market.	All	8	0%	0%	0%	63%	25%	13%	0%	0%	0%	42%	12			
	Sales Staff	4	0%	0%	0%	50%	25%	25%	0%	0%	0%	48%	15			
	CEO	1	0%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0			
	Management Staff	3	0%	0%	0%	67%	33%	0%	0%	0%	0%	42%	9			
4 We prepare an annual marketing plan.	All	8	0%	0%	0%	0%	0%	0%	88%	0%	0%	69%	5			
	Sales Staff	4	0%	0%	0%	0%	0%	0%	100%	0%	0%	67%	0			
	CEO	1	0%	0%	0%	0%	0%	0%	0%	100%	0%	83%	0			
	Management Staff	3	0%	0%	0%	0%	0%	0%	100%	0%	0%	67%	0			
5 We revise our marketing plan as needed during the year.	All	8	0%	0%	0%	13%	25%	63%	0%	0%	0%	58%	12			
	Sales Staff	4	0%	0%	0%	0%	25%	75%	0%	0%	0%	63%	8			
	CEO	1	0%	0%	0%	0%	0%	100%	0%	0%	0%	67%	0			
	Management Staff	3	0%	0%	0%	33%	33%	33%	0%	0%	0%	50%	16			
6 We have a current social media strategy.	All	8	0%	0%	0%	13%	13%	63%	13%	0%	13%	63%				
	Sales Staff	4	0%	0%	0%	25%	25%	50%	0%	0%	0%	54%				
	CEO	1	0%	0%	0%	0%	0%	100%	0%	0%	0%	67%				
	Management Staff	3	0%	0%	0%	0%	0%	67%	33%	0%	33%	72%				
7 We report Key Marketing Indicators to the staff.	All	8	0%	0%	0%	100%	0%	0%	0%	0%	0%	33%	0			
	Sales Staff	4	0%	0%	0%	100%	0%	0%	0%	0%	0%	33%	0			
	CEO	1	0%	0%	0%	100%	0%	0%	0%	0%	0%	33%	0			
	Management Staff	3	0%	0%	0%	100%	0%	0%	0%	0%	0%	33%	0			

Measures Disagreement Measures Agreement

Measures Alignment

Measures Satisfaction

# Client Value

- New Executive – Want lay of the land (data) fast
- Something's wrong – not sure what
- Need to spark momentum
- Strong leaders and the Bobblehead Syndrome
- PC/VC who want more from their investment
- Sales and Marketing not on same page or misunderstanding
- Consensus vs. Compromise
- **“How Aligned is Your Team?”**
- **“What were they thinking?!?!?”**
- **“If only I had Known”**

# Advisor Value

- **Adds “Product” Revenue** (w/o all the work!) and creates **High Realization**
- Part of your **Marketing Strategy**
  - ✧ Seeding Program and Public Workshop
- Use in your **Sales Process**
  - ✧ Takes Focus Off You & Puts it on Clients Issues
  - ✧ Increases your credibility
- Position Assessments (**Anywhere**) as **Stand alone revenue** (with bundled services)
  - ✧ Process of TBC allows virtual participation
  - ✧ Report Presentation easy to comprehend
  - ✧ Debrief Virtually or On-site
- Additional engagement revenue - Recurring revenue potential
- You control sales price (value pricing) – See Sales Baseline Value Calculator
- You do client billing

# Marketing Tools

- Advisor Tools include:
  - ✧ Presentation Materials
  - ✧ ROI Calculator for Client Presentation
  - ✧ Email templates
  - ✧ Public Workshop Strategy
  - ✧ Prospect/Client Seeding Strategy
  - ✧ Scoping Template and Calculator for Your Pricing
  - ✧ Photo listing on TBC website
  - ✧ Flyers

# Competitive Landscape

- Operational and Organizational Focus – Not How Good A Salesperson Is
- Focuses on giving the sales team a strong organization to leverage
- None with breadth and scale
- Group Segmentation (vs. all in)
- Benchmarks
- Weighing vs. Rating
- No Bias – Cronbach Alpha
- Quality Reports
  - ✧ Quadrant
  - ✧ Spidergram
  - ✧ Standard Deviation
    - Category
    - Group
    - Statement



# Certification Training

- Training includes:
  - ✧ Administrative Issues
  - ✧ Interpretation of Reports
  - ✧ Writing Executive Summaries
  - ✧ Marketing
  - ✧ Building Referral Networks
  - ✧ Pricing
  - ✧ Sales Objections
  - ✧ Holding Public For-Fee Workshops

# Thank You!

- Further information is available on:
  - ✧ Pricing
  - ✧ Consultant Income Opportunity Examples
- Questions, Comments and Suggestions Welcome!
- Contact us at 312-869-9008
- eMail [JR@TheBaselineCompany.com](mailto:JR@TheBaselineCompany.com)