

SALES LEADERSHIP CASE STUDY

Building Accountability Across Three Markets

Sales team development and sales-to-service coordination in an aquatic services business.

My role: Market Sales Director overseeing St. Louis, Kansas City and Denver.

Context: Prior employment experience, presented anonymously; not a paid consulting engagement.

What I walked into

The team needed clearer sales expectations, stronger accountability and a more consistent selling process. Sales and service also needed a shared way to move sold work into delivery. My focus was to build habits and procedures the organization could sustain.

What I changed - and why

Made accountability part of the weekly routine. I coached personal ownership of both success and failure. The expectation was to learn from a missed result and improve, rather than use explanations to avoid responsibility.

Aligned the team to the work. I restructured sales roles and coached the sales process to help the team become more consistent and professional. Clear roles gave people a better understanding of what they owned.

Put sales and service in the same conversation. I established a Friday meeting from 8:30 to 10:00 a.m. for collaboration between sales and service, supported by weekly touchpoints with operational leadership. Coordination became a recurring responsibility.

Documented the handoff. I created sales-to-service and sales-to-renovation procedures. Signed documents, customer information, purchasing and scheduling had explicit steps, rather than relying on informal follow-up.

What changed operationally

The work produced a restructured sales team, documented processes and a standing forum for sales and service collaboration. This case documents the changes I made to roles, working routines and handoff procedures. Financial impact is not quantified.

A concrete example: the sales-to-service handoff

For the service work covered by this procedure, I documented the sequence below. It made the transition from a closed sale to purchasing and scheduling explicit.

Step	Responsibility and handoff
1. Record the sale	Sales marks the deal closed won in Salesforce.
2. Complete the customer record	Complete the new-customer setup first. Attach signed contracts, relevant files and manufacturer quotes.
3. Notify service	Sales emails the service team with the supporting information, site contact, site address and tentative completion date.
4. Start purchasing	The coordinator creates the sales order; the purchasing owner creates the parts purchase order.
5. Confirm arrival	When parts arrive, send a photo of the bill of lading to the purchasing owner.
6. Request and confirm scheduling	Send the scheduling request. The scheduling owner schedules the work and calls the customer.

My leadership takeaway

A sales process needs to carry through to delivery. Closing the deal is one milestone; the next team still needs the information and ownership required to act. I brought accountability and collaboration together by making those responsibilities visible.

How I would apply this in a consulting engagement

I would first review several recent deals with sales and service, identify where information or ownership breaks down, and adapt the handoff to the client's actual roles. Then I would agree on measures such as handoff completeness, time to service acknowledgment and rework caused by missing information. These are proposed measures, not results from this case.