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EXCELPOINT CONSULTING BUSINESS DESCRIPTION

Specializing in working with senior executives to develop and implement competitively distinctive sales models to meet the requirements of business mix and related competitive strategies. Conventional and proprietary consulting methodologies typically emphasizing six activity sets: calibration of business plan implications for sales strategy; executive interviews and framing discussions; sales force interviews/focus group assessments and sales force risk-reward laboratories; data gathering and deep diagnostics; program and tool build-out with deep analytics, testing and proof of concept; and implementation and ongoing diagnostics. Proven sales optimization strategies and methods are enhanced with layered project processes that maximize sales force ownership of required changes. Consulting arrangements include traditional project work, client team management and informal executive advising.

REPRESENTATIVE SERVICES

Coverage Model Evaluation and Design – optimizing fit between expected business requirements and current sales structure, channels and roles; territory alignments and account loads; skills sourcing practices and knowledge management; deployment flexibility and speed; financial productivity levels; and general selling effectiveness. Project work products may include account scoring and segmentation, reengineered pipeline management practices, realigned sales organizational structures with restated sales unit charters, reprioritized and re-budgeted staffing across channels, mechanisms to achieve targeted mix of stability and flexibility within each channel, detailed job or role designs with allocated revenue/margin and headcount budgets, matching recruiting profiles, professional certification standards for each job or role level, career paths and associated certification requirements.

Sales Compensation Design and Implementation – identifying all key financial, internal and territory/account management outcomes required for each product, customer franchise, channel and sales position and evaluate variances from current levels. Rate and rank the net impact (positive, neutral or negative) of current management practices on each required result area; prioritize needed changes in any aspect of the performance management program – including selection, training, performance evaluation, targeted total pay and pay mix, actual pay levels and mix, promotional speed, job richness and challenge, cash and non-cash incentive design, incentive program rules and administrative integrity – to select strongest pay-related opportunities for improving business results. Project work products may include design of a new targeted total cash compensation structure; realigned base salary ranges and incentive guarantee arrangements; new or re-worked incentive compensation elements, formulas, thresholds, definitions and rules; an administrative guidebook; participant plan summaries and/or detailed documents; program rollout presentation and breakout session materials; and ongoing implementation assistance and coaching for management and administrative staff.

Goal Setting and Goal Maintenance – establishing potential values and risks associated with the use of formal goals; evaluate credibility/reliability of current forecasting and budgeting processes as well as credibility/value of ‘stretch’ objectives in sharpening sales force focus and motivating high levels of sales force achievement. Determine appropriateness of linking incentive and/or total compensation to goal attainment levels. Design and support implementation of any required formal goal-setting system; secure co-sponsorship by senior line and financial management. Project work products may include conceptual framework for new or revised goal-setting

program; goal-setting and goal-maintenance spreadsheet tools; administrative goal-setting and goal-maintenance tools; annual calendar milestone dates for initial and revised goals (if required); goal-setting rollout presentation materials and administrative tools; and ongoing goal-setting and goal-maintenance special issues support.

SECTOR CONCENTRATIONS

- Financial Services
- Medical Products
- Insurance
- Telecommunications
- High Technology
- Shipping, Logistics, Distribution
- Retailing
- Digital Media & Advertising
- Manufacturing

REPRESENTATIVE ENGAGEMENTS

National Health and Life Insurer

A leading U.S. provider of health and life insurance products and pre-paid health services sought to improve profitability by driving against two innovative performance metrics in its group market segments: product-specific and account-specific gross margins. In the absence of any industry best practices or competitive models the project team worked collaboratively across all impacted functions – finance, underwriting, marketing, broker relations, sales and human resources – to develop new customer databases, pricing models, broker support programs and incentives, sales force-underwriter teams, oversight arrangements to ensure underwriter independence, and sales compensation programs. Deliverables included realigned sales and underwriting structures, a complete overhaul of all cash and non-cash sales compensation arrangements, development of a new quota-setting scheme and implementation support for all program testing, rollout and post-rollout calibration. Results included fewer requests for bid concessions, a substantial decline in the number of unprofitable accounts and improved business margins.

Global Small Package and Freight Delivery Organization

A global organization providing logistics and small package and freight delivery services launched a five-year campaign to drive targeted growth at the customer, product and transit lane level throughout its domestic and international networks. Essential to its success were the development of strategically consistent performance metrics for sales people aligned with local business plans, decision authorities and incentives to drive cross-selling between business units, and successful implementation of a new sales culture emphasizing leveraged compensation opportunities, recognition for achieving aggressive performance standards, and career tracks within Sales and the larger company. Deliverables included focused recruiting strategies and job offers, enlarged and leveraged compensation packages, beta-tested motivators and performance metrics, overall compensation architecture to ensure internal and external equity, incentive calibration tools, compensation program design guides, and goal-setting and goal-maintenance programs. Results included strong growth in targeted local revenue levels and profit, significant improvement in selling professionalism, and high levels of senior and middle management confidence in program flexibility and effectiveness.

Manufacturer and Direct Marketer of Home Furnishings

A niche manufacturer, national retailer and direct marketer of home furnishings sought to revitalize its sales organization while rebranding its business, restructuring production and overhead costs, launching a new advertising strategy, closing and opening stores, and overcoming channel conflicts. Essential to its success was modeling store and direct channel economics and the impacts of job designs, staffing levels and sales compensation programs on each; identifying idle and under performing workforce costs; and analyzing relationships between store location, store size, staffing levels and market media spend. Deliverables included suggested store closings and markets that should be targeted for increased media spend and new performance systems, metrics and compensation programs for sales managers and frontline sales people in each channel. Results included rapid and sustained growth in revenue and profitability, growth in store count and annual same-store sales and significant increases in individual sales productivity levels.

CONSULTING CORE COMPETENCIES

Diagnostics: product-market alignments, sales strategies and current sales force effectiveness
Identification of current buying and selling processes, authorities and strategies
Analysis of microeconomics of the sales force vis-à-vis macroeconomics of the enterprise
Sales force segmentation and channel design
Sales force behavioral optimization
Sales force overall organizational design: authorities, spans of control, roles and coverage models
Sales force enablement: systems and processes evaluation, design and implementation
Executive coaching

PROFESSIONAL HIGHLIGHTS

ExcelPoint Consulting LLC, Principal (sales management consulting)

CRMlogics Consulting, President (sales management consulting)

Mercer Consulting, Sales Effectiveness Practice, Principal

Towers Perrin, Sales Management Practice, Principal and Southwestern Practice Leader

Sibson & Company, Sales Management Practice, Senior Consultant

Hay Associates, Strategic Management Group, Senior Associate

Booz, Allen & Hamilton, Business Strategy, Consultant

PROFESSIONAL DEVELOPMENT

Purdue University, PhD

University of Chicago, MBA

The University of the South, BA