

CASE STUDY

Vertex Taps Janek's Sales Consulting Expertise and Sales Training Methodology

Summary

The Global tax compliance software provider enlisted Janek Performance Group to develop consistent processes to boost Salesforce adoption and improve sales forecasting.

"If we didn't have a true partnership with Janek, this project could've gotten very difficult and probably wouldn't have made the timeline."

Shannon Kelly

Senior Director, Revenue Operations and Sales Enablement,
Vertex

About Vertex

Founded in 1978, Vertex is a global, publicly traded tax compliance software provider based in King of Prussia, PA. Today, they employ approximately 1,500 full-time employees.

The Challenge

While the organization has seen incredible growth over the past few years, they lacked standardized processes and faced Salesforce usage and adoption issues. This resulted in inaccurate sales forecasting and opportunity management practices.

After the company went public in 2021, the need for more accurate reporting and forecasting became a priority, as well as the need to standardize processes.

Seeking consistency across the sales organization in sales activity and opportunity management, they sought a consulting firm to analyze their current situation and provide recommendations tailored to their unique needs.

The Solution

After interviewing three organizations, Vertex chose Janek for their transparent communication and responsiveness. Prior to sharing proposals and signing contracts, Janek took the time to understand Vertex's challenges and dug into the Discovery phase. This was an important criterion in Vertex's decision, as it aligns to their own sales process.

From there, Janek's sales consultants conducted numerous interviews with Vertex's sales enablement team and other key stakeholders. These included sales leaders in the US and EU to understand their pain points. In total, Janek interviewed more than 35 people, a good representation of the 200-plus strong sales team.

Next, Janek drafted a process document mapping the different sales stages and their supporting activities. This was refined with input from 10-plus sales leaders before Vertex's sales enablement team implemented the changes.

To introduce and explain the new sales process, the changes were rolled out in a two-day training during a global meeting of sales leaders from the US and EU. Janek sales training facilitators presented the sales process and led group activities to support the understanding of the sales objectives, sales actions, customer actions, selling behaviors, exit criteria, and sales coaching practices. This was followed two months later by a soft launch bolstered by a virtual roadshow, of six sessions facilitated by Janek consultants and trainers to scale process understanding, application, and adoption by the broader sales team.

Spekit, a just-in-time learning platform that embeds playbooks, FAQs, knowledge, and processes in teams' tech stacks, worked closely with Janek in bringing Janek's sales process to life in Vertex's Salesforce, and Vertex's leadership was impressed by the flawless collaboration between the two vendors.

Building on the success of the leadership training and roadshows, Janek was asked to facilitate at the annual Sales Kick Off. The new sales process was reinforced by customized learning solutions including facilitation and role-play that isolated skill building for the Discovery stage.

The Results

With the new processes, including training the employees and the updates implemented in Salesforce, Vertex is better positioned to track leading and lagging indicators.

The company has improved visibility into each stage of the sales process and how it is adopted by their sales team. For example, their sales process allows them to link marketing assets to different sales stages. They can then measure when these assets are viewed and shared with clients. This helps them identify gaps where additional thought leadership and product information might be relevant.

The rich data that can now be tracked as part of the sales process redesign also led to friendly competition among the Vertex sales team, including identifying early adopters, and resulted in a monthly award program.

As Vertex transitions from a formal and structured approach to an agile one that adapts to changes in the marketplace, the sales process continues to evolve with adjustments to activities, exit criteria, asset development, and sales motions.

“I felt like we always had transparent communication with Janek team members. We really enjoyed working with them, and that makes a year-long project more rewarding and enjoyable.”

Shannon Kelly

Senior Director, Revenue Operations and Sales Enablement,
Vertex

We want to learn about your specific sales challenges.

Contact us to see how we can help your organization achieve its sales performance goals.

www.janek.com

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