EIGHT SALESPEOPLE. FOUR DIFFERENT COMPANIES.

Real Operating Decisions. Real Capability Failures. Real Business Outcomes.

An Executive Case Study in The O'Brien Method Series

COMPANY PROFILE

Industry: Business services — commercial insurance and employee benefits brokerage

Approximate revenue: $22–25 million

Business model: B2B brokerage; new business and renewal sales through eight producers organized into two regional teams

Growth stage: Second-generation leadership; scaling from a regional book of business toward national accounts

EXECUTIVE SUMMARY

Eight producers sold under one name and reported to two regional managers, yet they were not following a unified sales process. Each producer — and, in practice, each regional manager — had developed a private definition of what counted as a qualified opportunity, when a deal was truly "in motion," and how much pricing discretion to allow. Leadership had spent two years trying to close the performance gap between top and bottom performers through training and coaching, with limited effect. A diagnostic found that the gap wasn't primarily a skill gap. It was a systems gap: the firm was operating as four loosely federated businesses that happened to share a logo, a CRM, and a set of carrier relationships, and no single qualification standard spanned them.

THE SITUATION

The two regional managers had come up through the business at different times and under different prior leadership, and each had trained their producers in their own image. One region ran tight, structured discovery calls with a documented needs assessment before requesting any quote from a carrier. The other region moved faster and looser, requesting quotes earlier and using the carrier's turnaround time as the qualification filter — if a prospect didn't respond to underwriting requests, they were dropped; if they did, they were treated as qualified regardless of fit.

Leadership's read on the resulting performance gap was that some producers were simply better than others, which was true as far as it went. What that read missed was that producers within the same region converged toward similar numbers, while producers with similar tenure and raw ability diverged sharply across regions. The pattern tracked the system each region had built, not the individual seated inside it.

THE INVESTIGATION

The diagnostic pulled twelve months of closed and lost opportunities and coded each one against the criteria the producer said they used to qualify it. No two producers described the same criteria in the same way. Four informal definitions of "qualified" were in active use across the eight producers, roughly corresponding to the two regions and two additional variants that individual senior producers had developed on their own and never documented.

The consequences were most clearly evident in forecast accuracy and onboarding. New producers hired into the firm were trained by whichever regional manager or senior producer happened to onboard them, so the firm's forecast accuracy and win rate for new hires depended heavily on which of the four informal systems they inherited — a fact nobody had previously connected, because turnover and ramp time were tracked in aggregate, not by which internal "company" a new hire had landed in.

ROOT CAUSE

The root cause was the absence of a qualification standard at the organizational level. Individual regions and senior producers had each built a working system for themselves, which is why the firm functioned at all — but a working system that exists in four incompatible versions produces an organization that cannot forecast reliably, cannot onboard predictably, and cannot tell the difference between a producer who is genuinely strong and one who inherited the more disciplined of the four systems.

THE INTERVENTION

The fix was not to pick the best of the four existing systems and mandate it top-down — that approach had been tried once before and quietly ignored by the region that considered its own process superior. Instead, the qualification rubric was built jointly with both regional managers and the two most tenured producers, using the diagnostic's win-rate data to settle disagreements about which criteria actually predicted a close rather than which felt more rigorous.

Once agreed, the rubric was built into the CRM as a required stage-gate rather than left as a guideline: a deal could not advance to the quoting stage unless four fields — documented need, budget authority, timeline, and incumbent-carrier status — were completed and visible to both regional managers. New-hire training was rebuilt around the single rubric, removing the dependency on which regional manager or senior producer happened to run onboarding that quarter.

BUSINESS RESULTS

Within two quarters, the spread in win rate between the two regions narrowed by more than half, without either region's headcount or comp plan changing. New-producer ramp time to first qualified close shortened, because there was one system to teach instead of four. Forecast variance at the company level also improved, since the pipeline reported to leadership was, for the first time, built from opportunities qualified against the same standard rather than four different ones aggregated as if they were comparable.

THE O'BRIEN METHOD INSIGHT

A sales organization can have strong individual performers and still not be one sales organization. If qualification, stage definitions, and discounting discretion are allowed to vary by manager or by producer, the company is not scaling a system — it is operating several small systems under a shared name, and its forecast, its onboarding, and its growth ceiling will all reflect that fragmentation whether or not anyone has named it.

KEY TAKEAWAYS FOR CEOS

- A performance gap between reps is often a systems gap wearing a talent costume. Check whether high and low performers are actually running the same process before concluding it's a skill problem.
- Standardize qualification at the organizational level, not the team level. Two good regional systems that disagree with each other are worse for the company than one system both regions can defend.
- Build the standard with the people who will use it, calibrated against actual win-rate data — not imposed from above based on whichever process feels more rigorous.
- Onboarding inherits whatever system happens to train the new hire. If that system varies by manager, your new-producer ramp time is partly a function of luck.
- One rubric, enforced as a CRM stage-gate rather than a guideline, does more to close a performance gap than another round of coaching.