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CASE STUDY

THE WRONG LEADS TO THE WRONG SALESPEOPLE

Real Operating Decisions. Real Capability Failures. Real Business Outcomes.
An Executive Case Study in The O'Brien Method Series

COMPANY PROFILE

Industry: Software and technology: B2B SaaS company selling to both SMB and enterprise segments

Approximate revenue: $15–20 million

Business model: Subscription software sold through an inside sales team originally built for a single buyer segment.

Growth stage: Scaling beyond founder-led sales; recently layered an enterprise motion on top of an existing SMB motion

EXECUTIVE SUMMARY

As the company added an enterprise offering alongside its original SMB product, inbound leads continued to be routed round-robin to whichever rep was next in rotation, regardless of whether that rep was built for fast, transactional SMB selling or for slower, consultative enterprise selling. Enterprise leads frequently landed with SMB-postured reps who moved too quickly and underestimated the buying committee, losing deals to competitors running a proper enterprise process. SMB leads sometimes landed with enterprise-postured reps who over-invested weeks of consultative effort in small, fast-decision accounts. A diagnostic found that the routing logic had simply never been updated when the second motion was introduced, mismatching leads and rep skill by default rather than by design.

THE SITUATION

The enterprise motion had been added deliberately and with real investment: new collateral, a revised pricing structure, and hiring plans for future enterprise-specific reps. What had not been revisited was the mechanical layer beneath both motions. The CRM's lead-routing rule, built years earlier for a single, homogeneous buyer type, continued to route every inbound lead to the next available rep in sequence, without distinguishing deal complexity.

THE INVESTIGATION

The diagnostic segmented the twelve months of closed-won and closed-lost deals by both deal-type (SMB versus enterprise-scale opportunity) and rep-type (the sales motion each rep had been trained in and was best suited for), rather than treating the sales team as one undifferentiated pool. Enterprise-scale deals routed to SMB-postured reps closed at roughly a third the rate of comparable enterprise deals that, by chance of rotation, landed with a rep running a consultative process. The routing rule itself had no awareness of this distinction and had never been flagged as a gap because the team's aggregate close rate looked adequate. The mismatch was invisible until the data was split by rep-and-deal-type combination.

ROOT CAUSE

The root cause was an ICP and offer structure that had effectively split into two distinct buyer profiles and sales motions, without the operational routing and qualification logic being updated to match. Leads and rep skills were being paired by chance of queue position rather than by any deliberate assessment of fit, guaranteeing that a meaningful share of every lead type would land with a rep poorly suited to close it.

THE INTERVENTION

Routing logic was rebuilt to split on deal-complexity signals, including company size and buying-committee complexity, captured at the point of initial qualification, rather than defaulting to a round-robin sequence. Reps were reassigned to SMB and enterprise pods based on demonstrated skill fit from the diagnostic's performance data, rather than by tenure or availability. Qualification questions were revised to surface buying-committee complexity earlier in the conversation, so a mismatched lead could be identified and rerouted before a rep had invested weeks in a process poorly suited to the deal.

BUSINESS RESULTS

Enterprise win rate improved substantially once those opportunities were consistently routed to reps running the appropriate consultative process. SMB cycle time shortened once SMB-postured reps stopped receiving occasional enterprise leads that pulled their attention into long, low-probability engagements. Overall revenue per rep increased without any additional headcount, purely from correcting the pairing between lead type and rep skill.

THE O'BRIEN METHOD INSIGHT

Adding a new buyer segment or offer on top of an existing sales motion does not create two clean motions unless the operational plumbing underneath (routing, qualification, and rep specialization) is deliberately rebuilt to match. Left on autopilot, the old routing logic will keep pairing new segment leads with reps trained for the old segment, producing a single confused motion that, on the dashboard, looks like two functioning ones.

KEY TAKEAWAYS FOR CEOS

- Every time you add a new buyer segment or offer, audit whether your lead-routing logic still aligns with the assumptions it was originally built on.
- Segment your win-rate data by rep-type and deal-type combinations, not just in aggregate. Mismatches that are invisible in the aggregate often explain a meaningful share of lost revenue.
- Round-robin routing is a reasonable default for a single, homogeneous buyer type. It becomes a liability as soon as a second, meaningfully different buyer type is introduced.
- Qualify for deal complexity early enough to reroute a mismatched lead before a rep has invested significant time in the wrong kind of sales process.
- Specialize reps based on demonstrated skill fit, not tenure. A tenured generalist is not automatically the right rep for a newly introduced, structurally different motion.