Fyntra
Discipline over heroics.

CASE STUDY

THE BUSINESS THAT WORKED TOO HARD

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

COMPANY PROFILE

Industry: Energy: commercial and industrial energy services and efficiency contractor

Approximate revenue: $25–30 million

Business model: B2B energy services and efficiency retrofits; long, consultative sales cycle

Growth stage: Mature; high-effort culture, with leadership proud of the team's work ethic relative to competitors

EXECUTIVE SUMMARY

Leadership's proudest internal claim was that no competitor outworked them: more calls, more site visits, and more proposals per rep than any benchmark leadership had reviewed. Revenue growth had nonetheless been flat for two years, and leadership's instinct in response was to push for even more activity. A diagnostic found that the company was excellent at the visible, effortful front half of the sales process, generating first meetings and proposals, but had almost no systematic follow-up after a proposal went out. Deals were dying quietly in an unmanaged "waiting to hear back" status for months at a time, and the activity metrics the company tracked rewarded generating new proposals, not following through on the ones already in motion.

THE SITUATION

The company's culture and comp plan both reinforced front-end activity: calls made, site visits completed, and proposals delivered were the metrics reviewed in every sales meeting, and reps who generated the most new activity were recognized and rewarded accordingly. Once a proposal was sent, however, no comparable metric or expectation existed for what happened next. Reps moved on to generating the next opportunity, and a proposal that did not receive an immediate answer simply sat, with no defined cadence obligating anyone to return to it.

THE INVESTIGATION

The diagnostic pulled every open proposal from the prior eighteen months and traced what activity, if any, had occurred after the initial send. A large share had received no documented follow-up beyond an initial check-in, and many had aged well past the point where the buyer's stated timeline had passed, without the deal being marked lost or requalified. The company's headline activity metrics, including calls, visits, and proposals sent, were all strong and improving, which was precisely why leadership's instinct pointed toward more of the same activity rather than toward the follow-up gap the data actually revealed.

ROOT CAUSE

The root cause was a complete lack of follow-up discipline for proposals already in the pipeline, masked by a genuinely strong front end that made the company look busy and productive by every metric leadership was tracking. The business had built a high-effort, high-output front half and a nonexistent back half, and no one had noticed because the visible, effortful part of the job was the one being measured and rewarded.

THE INTERVENTION

A defined follow-up cadence, specific touchpoints, and triggers tied to time elapsed and buyer signals were built and applied to every open proposal, with ownership explicitly assigned rather than left to individual rep discretion. "Waiting to hear back" was retired as an acceptable pipeline status. Every open opportunity was required to include a scheduled next action, visible on the same dashboard used to track new front-end activity, so follow-through received equal visibility to prospecting.

BUSINESS RESULTS

Close rate on proposals already in the pipeline improved meaningfully within two quarters, without any increase in new front-end activity or headcount. Revenue growth resumed from deals that had, in effect, already been earned through the company's genuinely strong front-end effort and had simply been left to die from neglect afterward. Leadership recognized, for the first time with data behind it, that the growth ceiling had never been an effort problem.

THE O'BRIEN METHOD INSIGHT

A business can work extremely hard, by every visible measure, and still be capability-poor, because effort and operational discipline are not the same thing and are not measured by the same metrics. The hardest-working front end in the industry can still lose deals it has already substantially earned if nothing holds the organization accountable for the unglamorous, unmeasured work of following through on what it has already started.

KEY TAKEAWAYS FOR CEOS

- Before adding more front-end activity to address flat growth, check whether proposals already in the pipeline are receiving systematic follow-up. The ceiling may already be in your existing pipeline.
- Effort metrics such as calls, visits, and proposals sent measure only the visible half of a sales process. They say nothing about what happens after unless you build a separate metric for it.
- Retire any pipeline status equivalent to "waiting to hear back." Every open opportunity should have a scheduled next action with an owner at all times.
- A team can be genuinely excellent at generating opportunities and genuinely poor at converting them, and both can be true of the same people at the same time.
- Working harder is no substitute for a follow-up system. A less busy competitor with real follow-up discipline can out-close a harder-working team that lacks it.