

## Sales Momentum Optimization

### Summary

Sales Momentum Optimization focuses on strengthening revenue execution by eliminating friction in the deal closing process. By clarifying LPO validation ownership, standardizing deal handoff procedures, and aligning Sales and Accounting responsibilities, this engagement reduces rework, accelerates invoicing, protects margins, and improves commission accuracy.

### Program Objectives

- Reduce deal closing cycle time
- Minimizing administrative rework
- Protecting margins
- Accurate revenue recognition
- Accurate Commission payables

### Program Structure & Deliverables

#### Phase 1 – Discovery & Baseline (1-2 Weeks)

- Review deal flow, LPO volume, and cycle time
- Identify rework frequency and root causes
- Establish baseline metrics for cycle time and administrative load

#### Phase 2 – Process & Ownership Mapping (2-3 Weeks)

- Document current-state deal submission workflow
- Identify handoff gaps between Sales and Accounting
- Define clear LPO validation ownership model
- Design future-state validation checkpoints

#### Phase 3 – Implementation (4-5 Weeks)

- Deploy standardized Deal Close Checklist
- Implement LPO validation standards
- Establish structured LPO handoff template
- Align cross-functional accountability

#### Phase 4 – Validation & Measurement (30 – 60 Days Post-Implementation)

- Measure before/after cycle time

- Quantify reduction in rework hours
- Evaluate margin accuracy and commission consistency
- Validate improved invoice timing

## Core Engagement Duration

- 7 - 10 weeks
- Includes 30-Day & 60-Day KPI Monitoring

## KPIs

- Deal Flow Efficiency
  - Deal closing cycle time
  - Submission-to-invoice lag
  - Revenue recognition timing
- Quality & Accuracy
  - Margin variance
  - LPO cost accuracy
  - Commission accuracy / chargeback frequency
- Administrative Load
  - Accounting touchpoints per deal
  - Sales administrative time per deal
  - Rework hours per deal

## ROI/Financial Impact

### Assumptions

- 10 sales reps
- 15 deals per rep per month
- 1 hour of combined Sales, Management, and Accounting time lost per deal

### Annual Time Recovered

~1,800 hours per year

### Estimated Productivity Value

- \$60/hour fully loaded cost
- ≈ \$108,000 annually in recovered productivity

### Additional Financial Impact Considerations

Beyond direct productivity recovery:

- Accelerated invoicing can improve cash flow by reducing submission-to-invoice lag (e.g., even 5–7 days acceleration impacts working capital).
- Reduced commission corrections lower administrative clean-up time.
- Improved month-end accuracy reduces accounting reconciliation burden.
- Increased margin integrity reduces post-close financial adjustments.

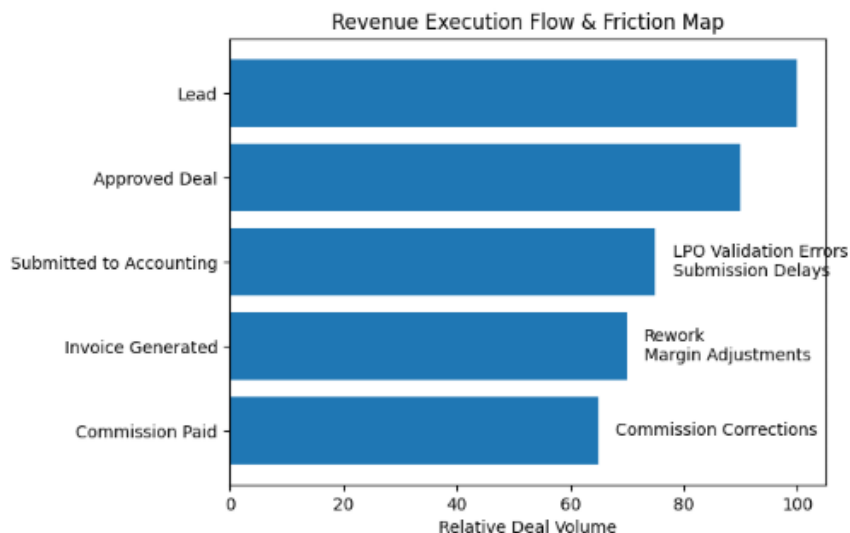
These benefits compound the operational ROI and strengthen financial predictability.

## Qualification Questions

- When a deal is submitted to Accounting, how often does it come back with questions?
- On average, how long does it take from deal approval to invoice?
- Are there peak periods where deal processing backs up?
- How often are LPO costs adjusted after deal submission?
- Do you experience commission corrections or chargebacks?
- Does month-end require deal-by-deal clarification from sales?
- How much time do sales managers spend resolving deal documentation issues?

## Deliverables

- Current-state LPO & deal-close assessment
- Documented future-state ownership model
- Standardized Deal Close Checklist
- LPO validation handoff template
- Before/after cycle time and productivity summary



This visual highlights where deal flow friction introduces delays, rework, and margin risk. The Sales Performance Optimization engagement removes friction upstream to prevent downstream correction.