



— CASE STUDY —

**HOW WE EXCEEDED
AGGRESSIVE QUOTAS
AND INCREASED
SALES BY 37%**



— BEFORE SALESKIT —

Scattered sales efforts with no reliable lead generation.



— RESULTS *WITH* SALESKIT —

A systematized sales process and sales playbook.
37% increase in sales growth YOY. Acquired by private equity.

KEY METRICS

During This Engagement





As founder of OTech, I historically did sales, customer support, accounting, strategy, and pretty much everything else except programming. As we grew, I realized we needed professional and focused sales assistance because I wasn't a natural salesman or sales leader. Mark did an excellent job helping scale our team and sales pre-acquisition."

— BRUCE STEINHARDT —

CLIENT OVERVIEW

I met with Bruce Steinhardt, founder, and CEO of OTech Group, after it was acquired in early 2020 by Ridgemont Equity Partners, a middle-market private equity investor, and HealthMark Group, a technology-enabled provider of release of information and other health information management services. The investment thesis was to combine OTech Group, a provider of patient intake management software and systems, with HealthMark Group to streamline the flow of patient data under one umbrella, all while helping to relieve administrative burdens associated with proprietary software solutions.

Together, we reflected on steps taken pre-acquisition specific to sales to ensure the OTech sales team professionalized and systematized their efforts. We both knew post-acquisition companies have aggressive sales projections, fast timelines, and growth expectations. There was no room for missed quotas. And so, we helped the OTech team with three major outcomes:

- 1 Build the sales playbook for a scalable foundation
- 2 Install the first SDR team to increase lead flow
- 3 Increase sales velocity through a more robust outreach program

Bruce had a strong background in healthcare administration after spending much time as a senior executive at several large healthcare providers. He checked into his flight on a kiosk one day and realized that the same thing could be done for doctor's appointments. He decided to fix this inefficient process with his company OTech Group. After a few years of growing the business, he found himself with a small sales team that was good but needed to be great as it grew in headcount and revenue.

We started with auditing and rebuilding the outbound sales messaging campaign. This included developing new value propositions, outbound cadences, and targeting new customer profiles.

This immediately increased resonance with the ideal buyer and was able to pave the way for more demos and sales. We also set up scorecards and a higher level of accountability and process.

All of the lessons learned from outbound were translated into a sales playbook that was used to systematically train and onboard new sales hires.

With this new playbook, an organized, searchable, and shareable source of truth for best practices and processes to use during training and beyond was developed. With new team members coming on board both backfills and growth positions) this was a crucial tool for growth.

The playbook saved reps almost 30 mins per day per rep ...nearly 8,000+ hours per year!

For a long time, OTech solely relied on tradeshow and events to fill the top of their funnel. Realizing that more leads were needed, we spun up their first SDR Team.

We recruited, interviewed, hired, trained, and onboarded the first outbound SDR team member, immediately booking new demos from cold leads. In the process, a robust pipeline that wasn't dependent on conference and tradeshow activity was nurtured.

MARK EVANS

SalesKit Founder



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Most entrepreneurs & companies fail not because they can't build products, identify markets, or price their products properly, but because they *can't sell their product* and run out of money before they get traction.

A handwritten signature in black ink, appearing to read 'Mark P. Evans', written in a cursive style.

Finally Master Your Systems & Build an Unstoppable Sales Force

Call or text: 920-918-3316

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Or book a call at: GetSalesKit.com