

THE HEADLINE FINDING

"There are strong bones - loyal customers, credible delivery and people who care. What's been missing is a clear commercial engine to turn that potential into consistent, scalable growth."

77%

Win rate when leads come in

8 wks

Average sales cycle

~95%

Revenue from existing accounts

0

Structured new business function

6 ROOT CAUSES

- 1

No commercial operating rhythm
No pipeline meetings, no cadence, no accountability.
- 2

CRM not working as a tool
Data exists but anxiety means it doesn't drive action.
- 3

Reactive account management
KAMs are service-led. Cross-sell opportunities missed.
- 4

Weak qualification discipline
Every account treated the same regardless of potential.
- 5

Role ambiguity & change fatigue
Team has lost clarity on direction and what good looks like.
- 6

Weak value articulation
Conversations drift to price. Margin under pressure.
- 7

Membership Decline
Key revenue stream is shrinking without structure.

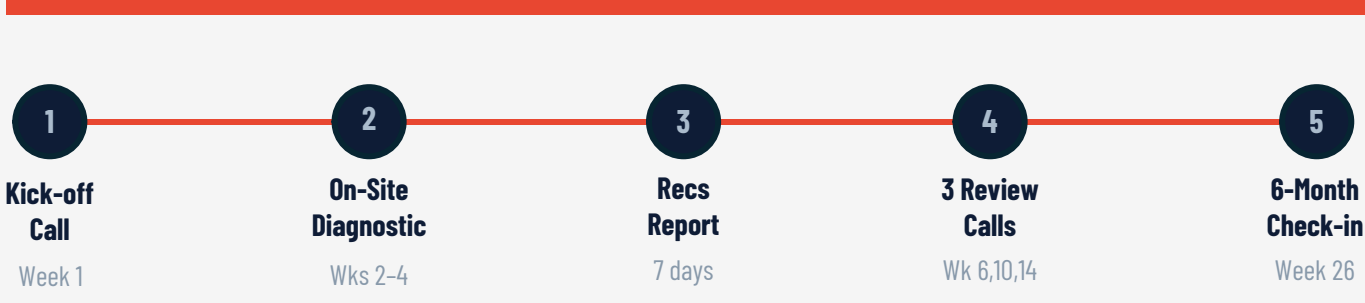
SWOT AT A GLANCE

Strengths	Weaknesses
77% win rate when leads come in. - Selling products customers have demand for. - Metric/target focuses in place. - Talented middle management. - Customer base - untapped platform for growth.	- No commercial rhythm or cadence. - CRM viewed as admin, not insight. - KAMs are administrators, not growers. - No new business hunting function. - Value proposition inconsistently used.
Opportunities	Threats
- Untapped cross-sell in existing accounts. - Membership referral engine unused. - AI tools to amplify outbound reach. - Pricing architecture – margin gain. - AI upskilling – high-growth adjacent market.	- Revenue concentrated in few accounts. - Role ambiguity – morale & retention risk. - Competitors with stronger processes. - CRM disengagement worsening. - Scaling without commercial maturity.

RECOMMENDATIONS

Short Term	0-90 Days
	→ Run a lost deal audit and call every stalled opportunity. → Identify top 5 accounts per KAM with uninvoiced growth potential. → Establish and run a consistent Commercial Operating Rhythm - weekly pipeline meeting, monthly commercial review. → CRM: Listen first, bulk-fix once, then a 90-day stability period. → Personal phone calls to every lapsed member – with a reason to return. → Clarify roles: Separate KAM growth accountability from Customer Service activities and New Business. → Run a half-day value proposition workshop.
Medium Term	3-9 Months
	→ Implement structured Account Growth Programme with tiered segmentation. → AI-assisted outbound lead generation (Cognism, Apollo). → Pricing architecture review across delivery formats. → Sales Development Programme for KAM team with Chilli. → AI upskilling as a new service offering for SME's. → Give a dedicated incentive budget for sprint-based team rewards.
Long Term	9-18 Months
	→ Commercial Leadership & Governance - formal cadence & 3-year growth plan. → Scalable new business function – hunter or fractional BD. → AI embedded as standard in commercial workflow. → Target 40%+ recurring/contracted revenue. → Formal referral partnership network across complementary businesses.

THE CHILLI CONSULTANCY JOURNEY



WHAT GOOD LOOKS LIKE – 90-DAY MEASURES

- ✓ Weekly pipeline meetings running – no chasing. Uplift on revenue and new business.
- ✓ CRM updated by all team members routinely.
- ✓ Top 20 member advocates contacted; referral scheme live.
- ✓ First referral-generated leads tracked in CRM.
- ✓ One-page role clarity documents agreed per person.
- ✓ Value proposition card in use in customer conversations.
- ✓ Leadership can see top 10 opportunities at a glance.
- ✓ Team reporting increased confidence and direction.

WHY THIS WORKS

- Built on genuine diagnostic insight – not assumptions.
- Realistic for the current team, constraints and bandwidth.
- Sequenced: foundations before acceleration for the future.
- Accountability built in – three review calls + 6-month check-in.

The growth opportunity is real. What's needed now is clarity, rhythm and the discipline to hold it in place.