



STRATEGY | LEADERSHIP | SALES | SERVICE | CHANGE

CASE STUDY

FACILITATE FOR RESULTS

Driving Operational Excellence with Planit

CUSTOMER

Planit –The Solution Specialists

INDUSTRY

Manufacturing software

REQUIREMENTS

- Build operational excellence with the sales team
- Strengthen teamwork

SOLUTION

- Unitive sales consulting
- Unitive bespoke facilitation – Sales Conference

BENEFITS

- Improved sales team collaboration
- Sales team input and engagement to the Planit operational excellence journey
- Clear and mutually agreed team action plan

Facilitating a sales conference might have been a small drop in the ocean, however with Unitive’s help this became the incubation of an operational excellence journey that is generating a ripple effect.

Planit is Australia’s leading software solutions provider to the cabinet making and shop fitting industry. Bringing state territory managers together is always a significant investment and getting maximum participation and engagement is a challenge. Action oriented outcomes are also critical. With Unitive’s facilitation and sales excellence experience the conference was a success with one team member stating “This was the best sales conference I have attended in 25 years”.

With a short lead-time the change journey to operational sales excellence was “kicked off” with key benefits of:

- Improved sales team collaboration
- Engagement and buy-in to the change journey
- A clear shared and mutually agreed action plan that management are coaching and reinforcing

“Joe took our sales team through a 3 Day conference aimed at promoting ‘Operational Excellence’. The sessions he ran were really productive, because Joe was able to get the group interacting and contributing. Joe’s experience really helped guide us in the direction, and our team has walked away with some clear actions to help improve our performance. Getting Joe on board was a huge part of the success of our meeting” – Steve Cugley, General Manager – Planit

Talk to Unitive today about how our skilled facilitators can maximize your face-to-face internal or client meetings.

