

## CASE STUDY: Worldwide Tele Program Development

**Solution:** SharePoint Site

**Services Provided:** Program Development, Consulting & Design

*Bloom Consulting Group is a fast-growing business management consulting firm that delivers strategic services to security, marketing, and sales executives.*

### Engagement Overview

The client required assistance to pilot a Lead Management Program and a Tele Sales Partner Engagement Program. They wanted to educate stakeholders and develop/mature the processes. Since this was a global strategic program it was critical to measure the value of that investment. Bloom Consulting Group was chartered to manage the details of the process.

### Challenges

Lack of clear process for corporate to work with field and program partners.

Lack of data and reporting on program performance.

No single repository of program resources for corporate and field to access.

### Bloom Solution

The Bloom team implemented key processes for corporate and field to manage the engagement with program partners and customers. Tasks included creating a centralized repository of the content and Bill of Materials that was complete and easily navigable by the worldwide field, and designing a database for all field-facing program elements, including materials for coverage, performance, readiness, governance, process, resources, tools, and reporting.

### Services

#### Consulting Support

- Designed a Live Listening feedback submission process and created a distribution group.
- Designed a partner feedback submission process including distribution group and recording/reporting progress.
- Created lead management local initiative submission form and process.
- Designed the subsidiary partner submission process.
- Streamlined process and documentation for requesting a vendor site visit.

#### Program Development Support

- Collated area and subsidiary-level key contact lists.
- Created Lead Management program landing page one-sheet for program validation.
- Managed meetings with notes and action items.
- Refined the process for the categorization of customer leads to enable greater accuracy in reporting.

#### SharePoint Site Design

- Designed a SharePoint site for detailed overviews, coverage information, and materials to help the field understand the programs including:
  - Program overview documents.
  - Readiness documentation on vendor training.

