

PROJECT VIGNETTE 1 OF 3

Building shared understanding among IBM global sales and marketing executives

Executive learning and process simulation

The problem

IBM's transition from territorial to global sales required executives to develop a common understanding of how the new sales transaction process would work. As part of its global customer relationship management (CRM) deployment, leaders needed to see how decisions across interconnected activities would affect performance and coordinate implementation.

The approach

Jim Rogers collaborated in designing and developing a process simulation and executive workshop, remaining personally involved from design through delivery. The simulation gave executives a shared representation of the proposed sales process. Participants explored how decisions, feedback, and delays affected their ability to meet specified revenue, profit, and customer satisfaction goals. Customer delight was central to understanding how the process should serve customers.

The result

Jim personally conducted 30 workshops for approximately 1,000 IBM sales and marketing executives in Europe, the Middle East, and Africa (EMEA). The workshops provided a common basis for discussing the new operating model, testing assumptions, and examining how coordinated decisions could influence results. For the program's delivery in North and South America, Jim trained the trainers. The contribution was a practical management learning tool that helped executives develop a shared understanding of the transformation.

Could this help your organization

Would your management team benefit from exploring a proposed change together before putting it into practice? AMG can work with your team to develop models and learning tools that make interdependencies visible and support a common understanding of how the work produces results. Jim stays personally involved from design through facilitation, helping your team examine choices and prepare to act together.

Basis: Jim Rogers' practitioner account, Learning to See the Work, and his clarification of workshop delivery. Revenue, profit, and customer satisfaction were simulation goals; this vignette makes no claim of measured financial gains.