



Sample materials:

**Organization Design &
Excellence for
Distributors**

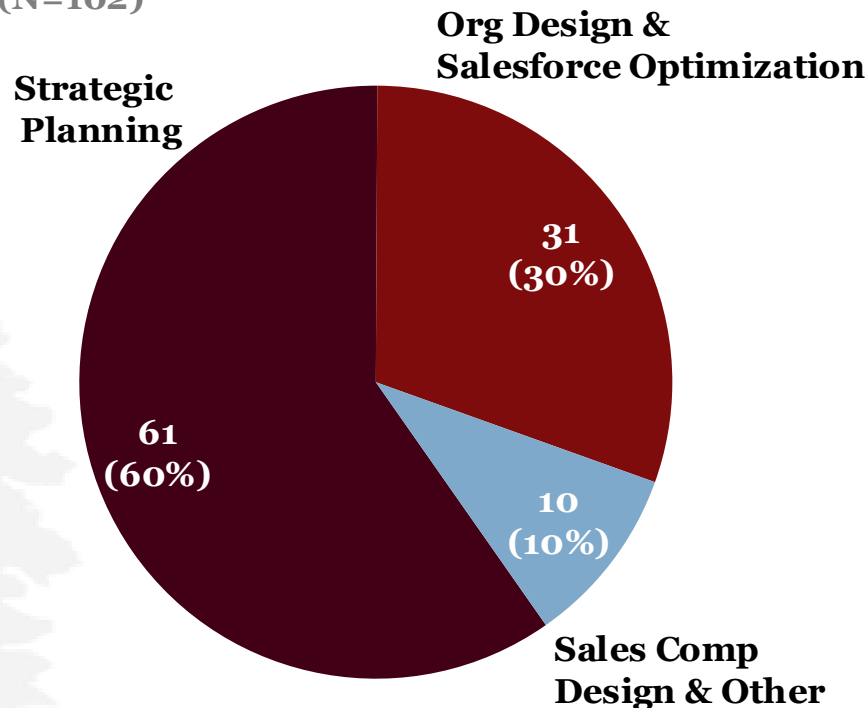
Organizational Design & Excellence: Process Overview

Phase	 Current State Diagnostic & Assessment	 Future State Org Design	 Org Design Implementation Roadmap
Key outcomes	Assess top strengths and major gaps of current org across structure, roles, processes, etc.	Design future-state org model by developing and assessing 1-3 key options	Align around a future-state org model and develop plans to smooth the transition
Key activities	- Assess the current org's structure, roles & responsibilities, and talent - Assess the current-state processes, governance, and outcomes & metrics - Create a comprehensive, vetted, granular map of the current organization (i.e., lines and boxes), including roles and reporting lines - Identify key activities and responsibilities for current roles and levels	- Set the strategy and guiding principles for the new organizational structure - Draft potential org models - Articulate the pros and cons of each org model; refine models as helpful - Select and align on a future-state org model - Define key activities and responsibilities for future-state roles and levels - Estimate future-state staffing levels for all key roles	- Develop a detailed timeline for executing the transition to the future-state org - Identify the key gaps between current- and future-state org - Articulate and assign key next steps to key stakeholders - Map employees from the current to new org structure - Identify critical processes to manage while transitioning

Projects can unlock ~**5-10% productivity gains** and **reduce decision cycle times by ~20-30%**

Redwood Advisors helps distributors unlock untapped growth with best-in-class sales & marketing (GTM) design and transformation

No. of projects (% of projects)
(N=102)



Org Design & Excellence overview

We help distributors **substantially improve org effectiveness** by **tightly aligning org structure**, roles and responsibilities, core processes, etc. **to overall strategy and top enterprise-wide objectives**

Previous clients – *Illustrative sample*



Agenda

Current State Diagnostic

Future State Design

Implementation

When assessing an organization, RWA takes a hard look at the who, what, and how

Category

Overview

Who

- An organization's structure (i.e., lines and boxes) and staff

What

- The objectives and responsibilities of key staff and groups – and key measures to track over time

How

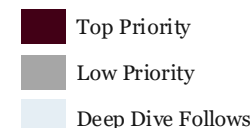
- The systems, processes, and cultural practices that drive day-to-day operations & get things done



RWA has identified 6 core elements of a healthy distribution organization to analyze across those 3 categories



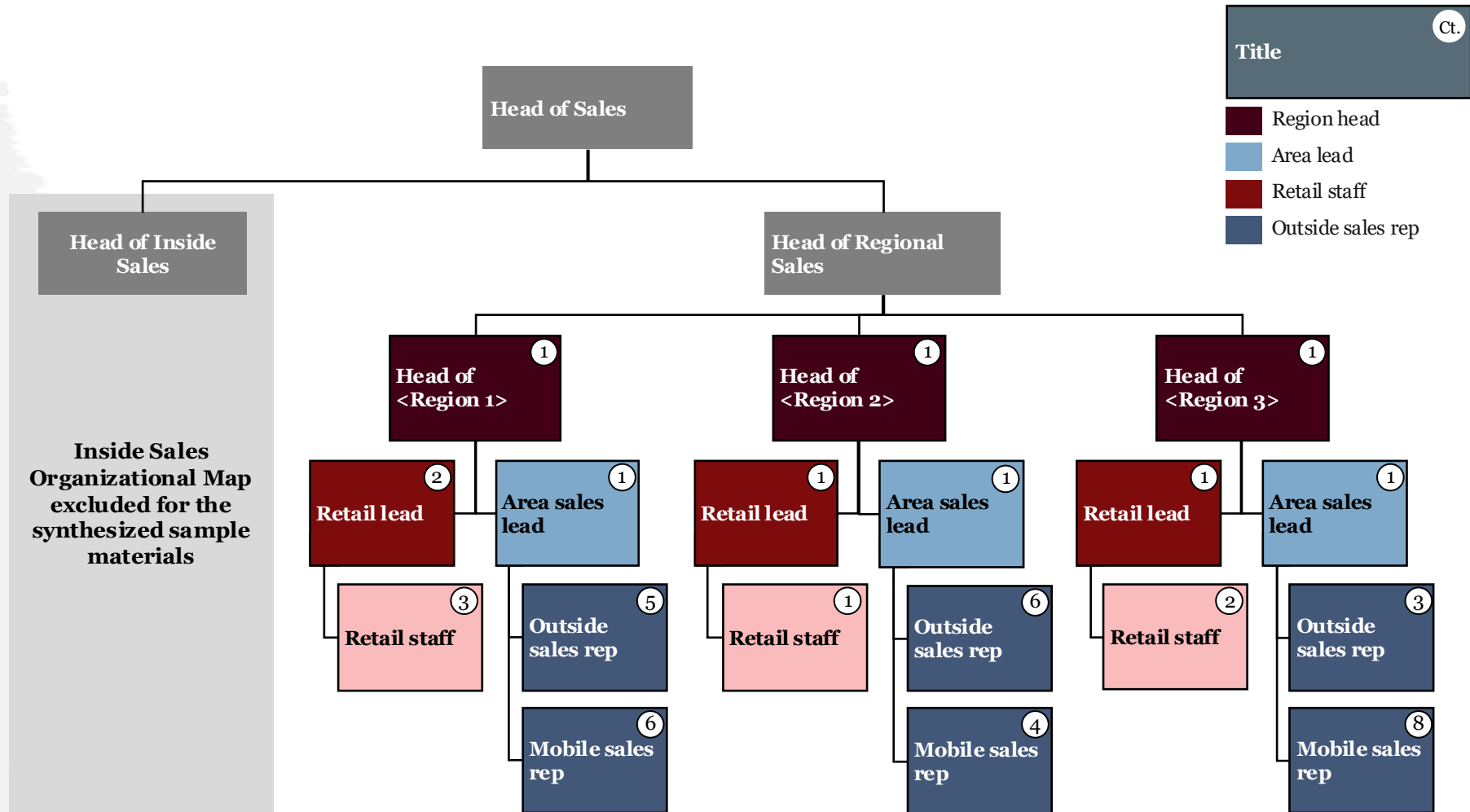
Based on interviews & our research, the team conducts a clear-eyed assessment of the current state



Core Elements	Overview	Pain Points (<i>Illustrative</i>)	Current State
Organizational Structure	Organization and reporting structure	- Reporting lines within regions are structured differently & struggle to communicate - No clear POC across inside and outside sales	
Roles & Responsibilities	A clear articulation of each member's responsibilities	Potential clients may need to go through 3-5 sales team members over their journey, creating role overlap & confusion	
Talent	A set of people that have critical skills, mindsets, & attitudes that align with the organization	...	
Outcomes & Metrics	Key measures that align the organization around critical priorities	...	
Governance	A system & cadence that enables interaction & collaboration to create effective strategic & operational decisions	...	
Core Processes	Clear and explicit pathways that enable important things to get done	...	

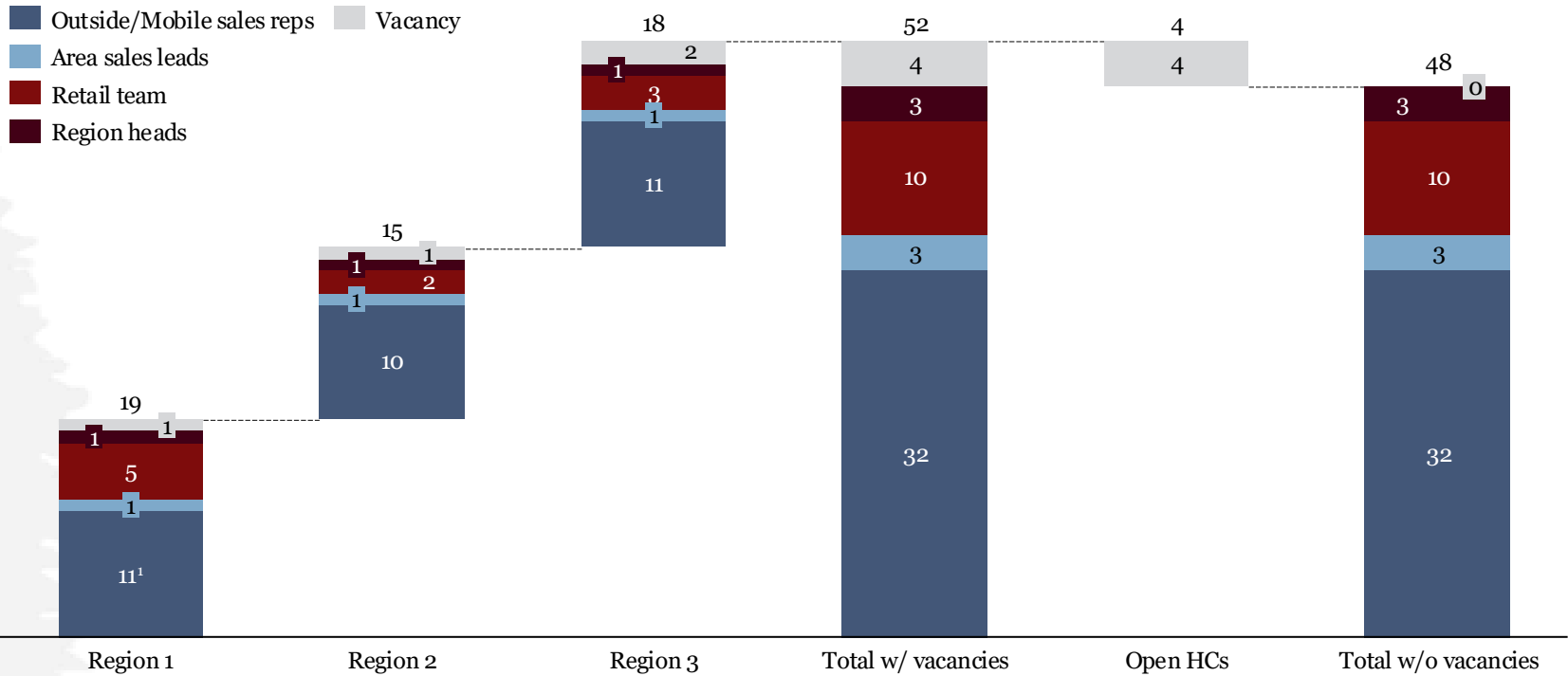


A full current-state org chart is laid out to illustrate key roles and reporting lines: Sales org deep-dive



RWA outlined the current state staffing levels by team and key organizing dimensions

Sales current-state FTEs by team (# of FTEs)



Team:

Original client materials included a list of individuals per group

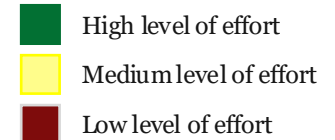
Notes: (1) <Overview of sources & key assumptions>

The team then developed an overview for all activities performed by each role in the org

Illustrative positions

Illustrative positions	Job description	Key activities
Outside Sales Rep.	• Manages entirety of relationship with customer including order entry, order management, and some customer service	• Customer route planning • Customer visits • Order taking via multiple methods • Order entry process • Store partnership (visit/talk to store) • Taking paper-based notes
Mobile Sales Rep.	• Uses the store as a “home base” to sell to customers and to load up van and make “milk runs” to customer sites	• Customer route planning • Van inventory management • Customer visits • Order entry process • Order management • Store partnership (visit/talk to store)
Regional Sales Manager	• Manages sales reps. within their region including reviewing sales performance • Manages relationships with accounts as an OSR (if applicable)	• Customer visits • Team/one-on-one meetings • Report building • Managing T&E expense • Customer service assistance • Activity management

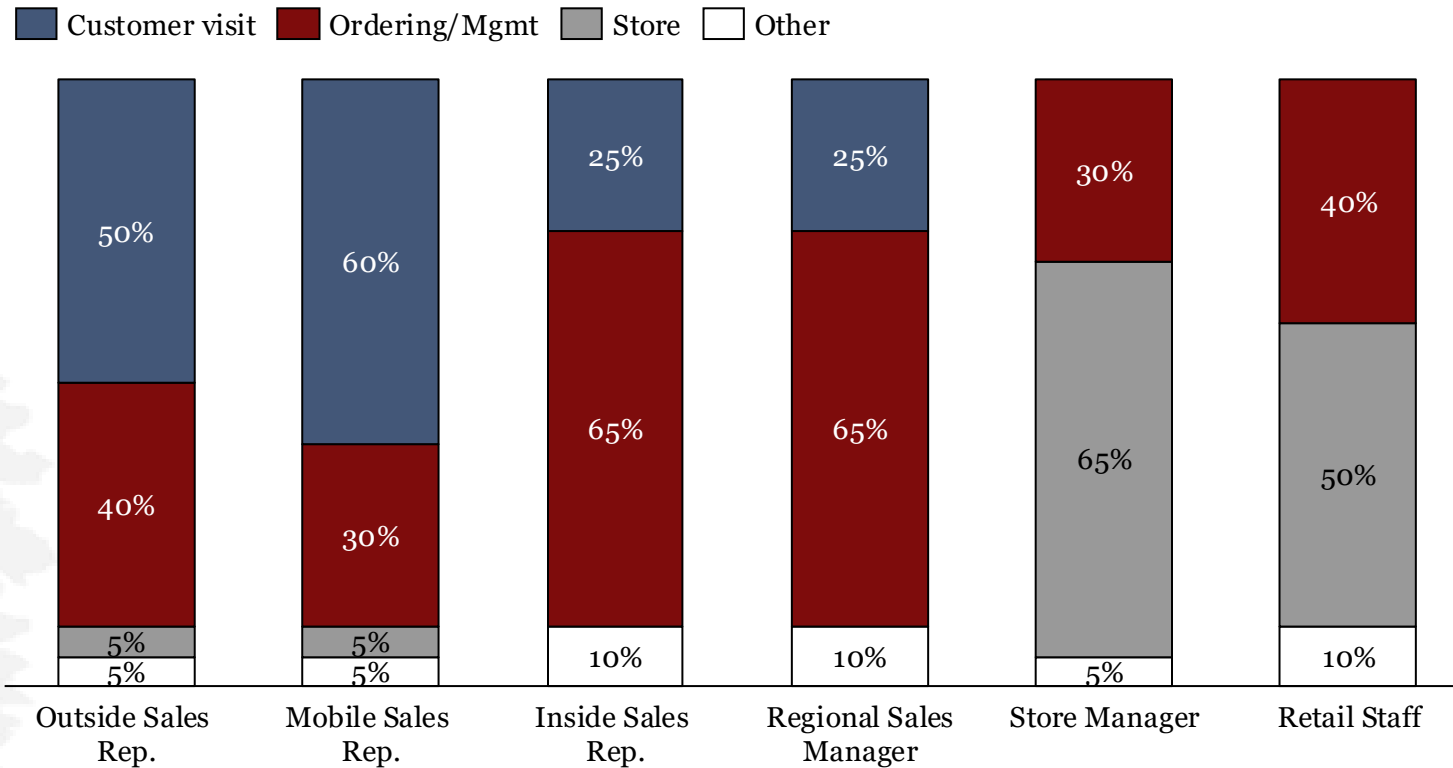
For each key role, high-level activities were assigned a level of effort for comparison



	Customer Visits			Ordering		Sales Management		Store	
	Route/Call Planning	In Person Visit	Phone Selling	Order Entry	Customer Service	Customer Analysis	Team Management / Admin	Store Operations	Store Selling
Outside Sales Rep.	High	High	Low	Medium	Medium	Medium			
Mobile Sales Rep.	High	High	Low	High	Medium	Low			Low
Inside Sales Rep.	High		High	High	High	Low			
Regional Sales Manager		Medium			Low		High	Medium	
Retail Lead			Medium	Medium	Medium			High	High
Retail Staff			Low	High	High				High

Percentage of time devoted to high-level activity categories was calculated by role to determine what activities made up the most time for each

Percentage of time for activity category by role



Both outside and mobile sales reps spend a significant amount of time on ordering and sales mgmt. with an est. 30-40% of outside and mobile reps' time going to these tasks

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Potential dimensions for organizing the org are laid out for consideration

Category	Overview	Illustrative examples	Key consideration
Geography	What region the team member reports into given their work location	<Region 1> <Region 2> <Region 3>	Sales historically has been organized primarily by geo.
Function	How that team member sells (e.g., outside, inside, retail)	- Outside - Inside - Retail	Some functions could perform better with a center-of-excellence model
Customer segment (size)	Key customer segments based on key dimensions (e.g., revenue, number of employees)	- SMB - Mid-market - Enterprise	Customers meaningfully different based on segment

Key stakeholders align on key org design questions to address

■ High-confidence ■ Open to discussion

Questions

Should retail staff be split off from outside sales?

Key options & considerations

- Retail team is goaled on different metrics from the outside sales reps; sales managers have limited time to focus on retail side

Hypothesis view

- Team should split off retail into its own center of excellence to focus both teams on core functions

How do we organize inside sales?

- Inside sales can be organized by region, category, end customer, etc. based on what our customers value most
- Run initial pilot with inside sales organized by region given variance in sales approach & key products by region

Who does the inside sales team report to?

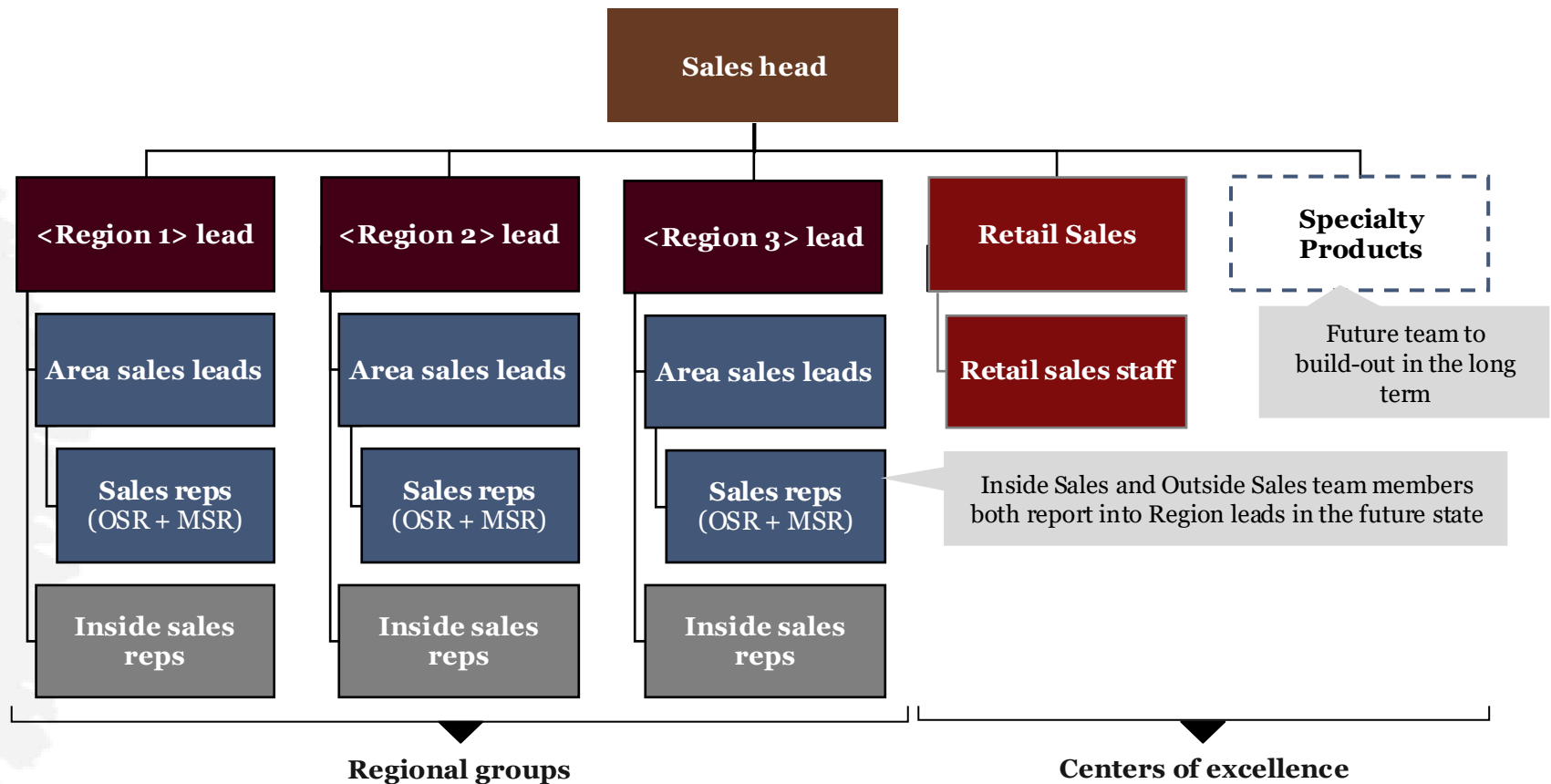
Do we need area sales leads?

Team develops a list of all key questions (usually 5-10) to address with the model to ensure the future-state vision covers all key issue areas in the current state



Team develops and maps out 3+ potential org models for analysis (1 of 2)

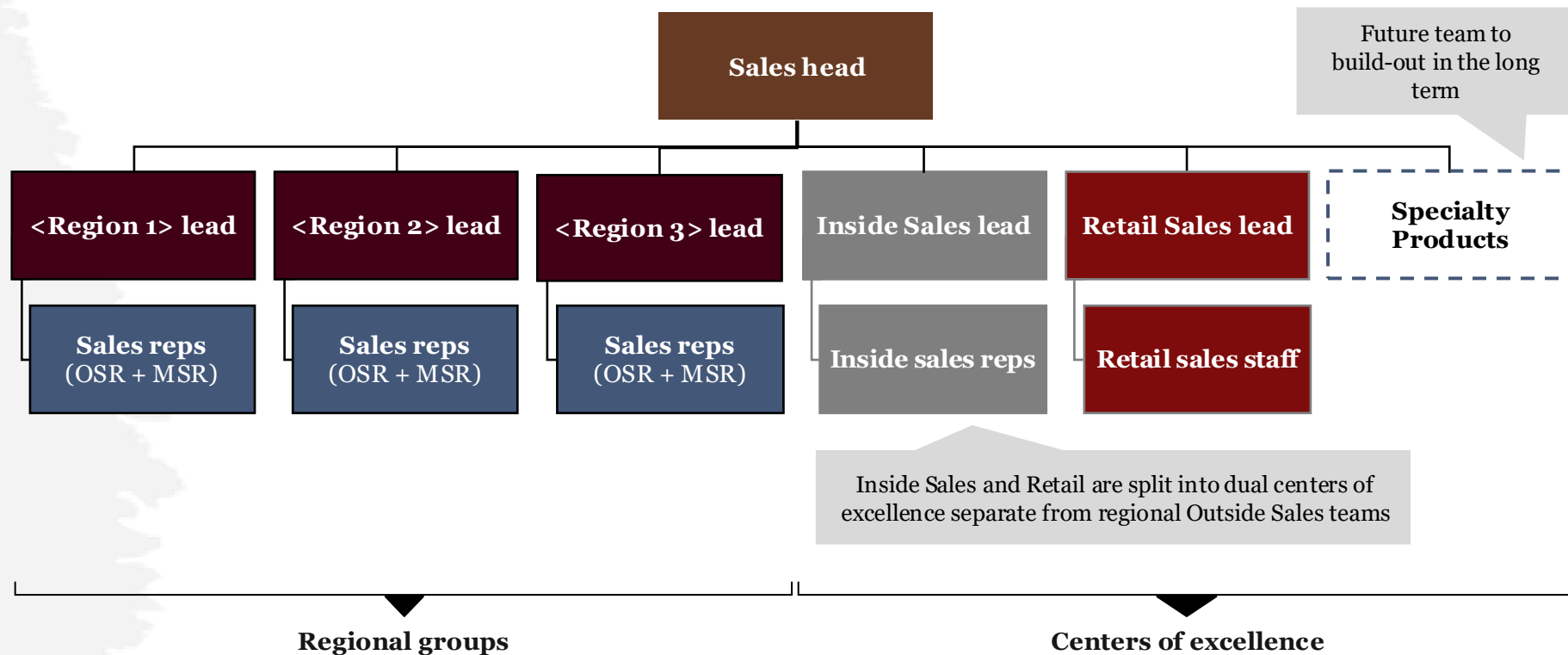
Potential Org Model 1



RWA works with key stakeholders to rigorously identify the key pros and cons for each org model

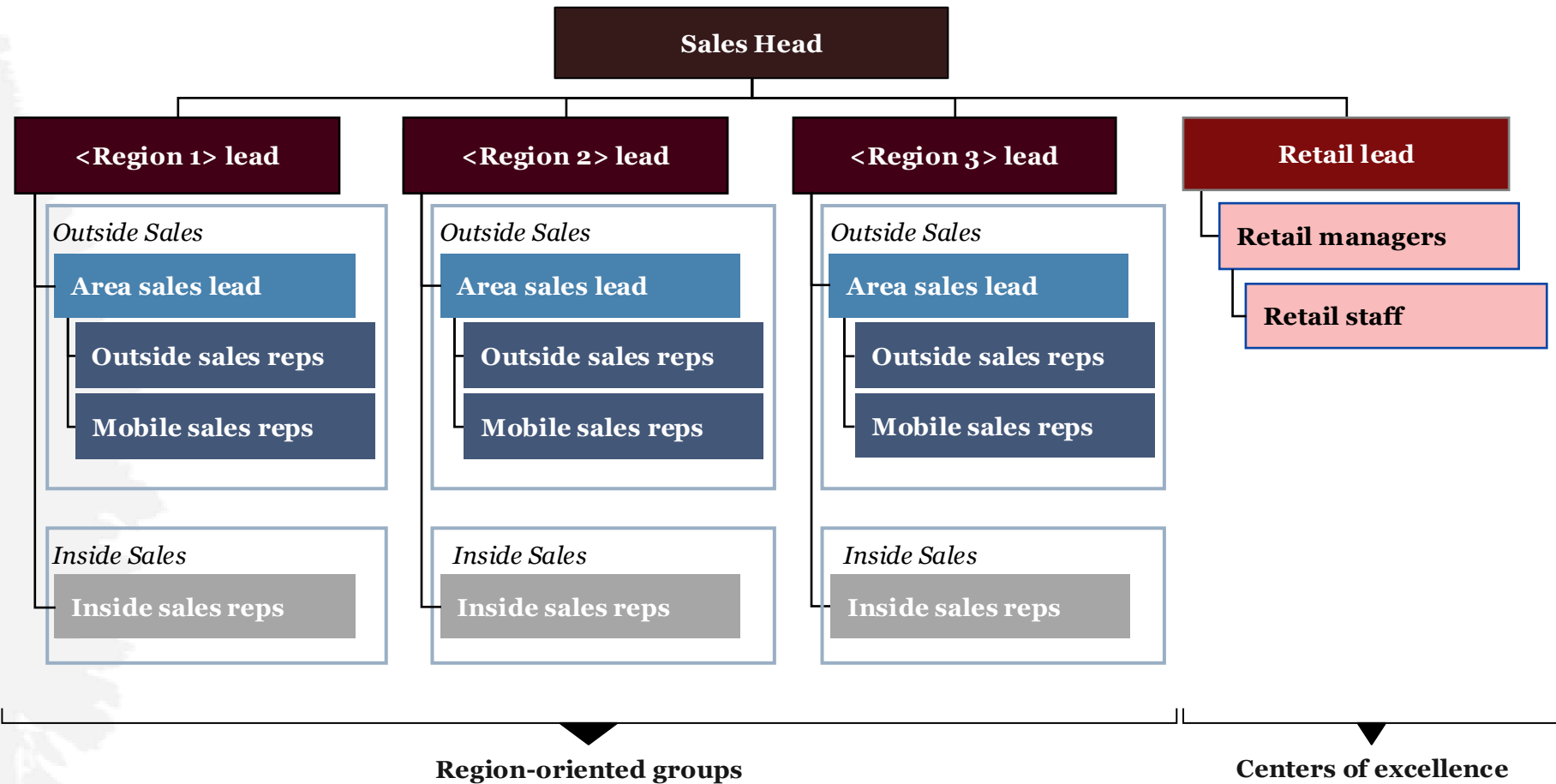
Team develops and maps out 3+ potential org models for analysis (2 of 2)

Potential Org Model 2



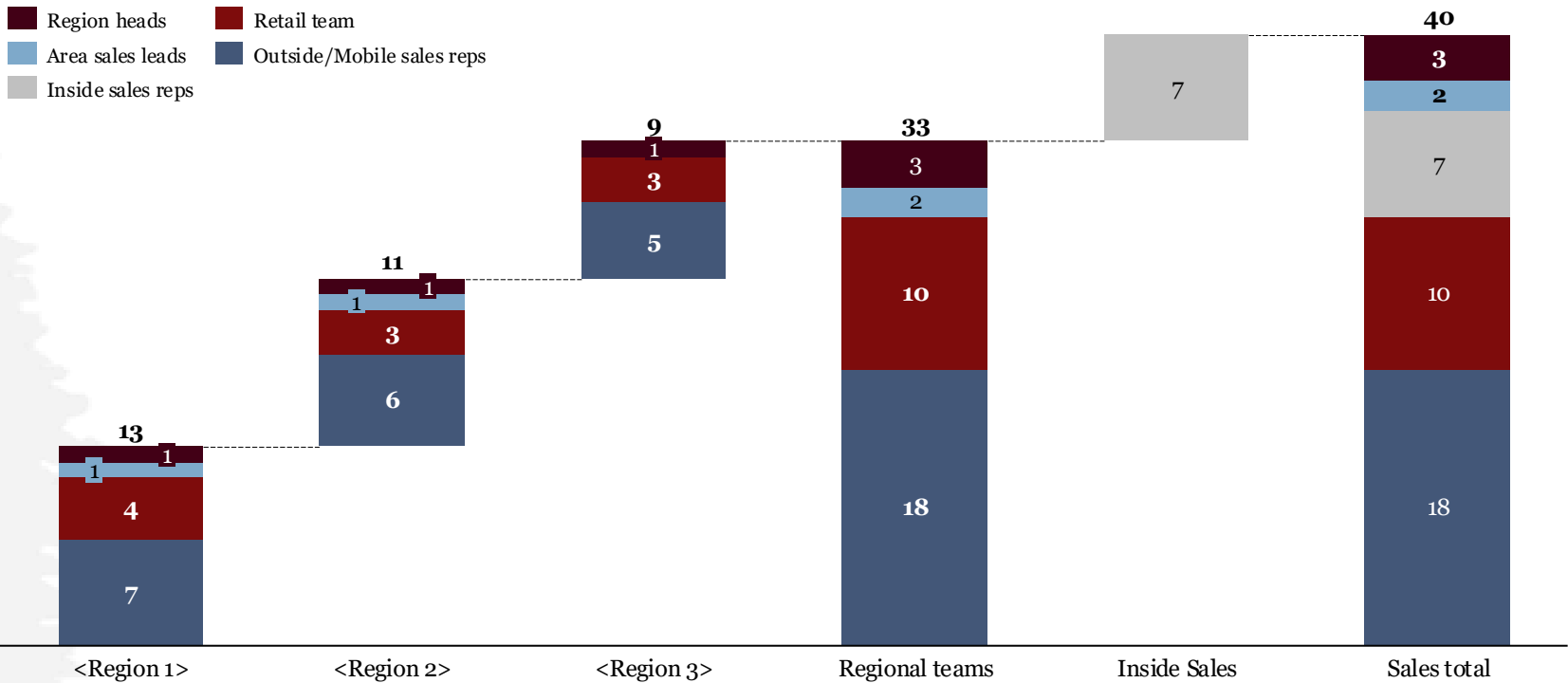
RWA works with key stakeholders to rigorously identify the key pros and cons for each org model

The team then reviews & approves the top proposed organizational model for the future state down to the role level



Hires and major role changes for the future state organizational model are mapped out to help accelerate implementation

Future-state FTEs by team (# of FTEs)



Current
staffing:
Change:

Team drafted 2 supporting cases on top opportunities for additional investment in new team members



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Top activities to drive the transition are laid out and assigned owners to drive ongoing progress in the transition

Category	Top Activity	Responsible	Supporting	Current state	Top next steps	Status
Org. Structure	Transition to new org model	• Jeff	• Colson / Renner	• ~80% of transition to new model completed	• Hold one-on-ones with market leaders • Finalize assignments for multi-region staff	
	HR enablement	• Jeff	• Colson	• Key future-state roles identified • Role objectives / activities drafted • Town hall scheduled	• Finalize mapping to future state roles • Finalize future-state R&Rs • Approve key roles with <CEO>	
	Annual planning	• Anne	• Jeff	• Planning forms fully drafted • Key planning meetings scheduled	• Pull in cross-functional stakeholders for input on next year plans • Align with Region Heads on forecasting process	
Roles & Resp.	Finalize role descriptions	• Kristy	• Merida	• Aligned with HR on future-state roles and objectives / activities	• Need to redefine “Sr. Sales Rep” role by segment	
	Map staff to new roles	• Kristy	• Jeff	• ~40% of mapping to future roles completed for existing team members	• Finalize 4 outstanding assignments • Finalize decision on manager assignments	



Each key activity is then placed on a roadmap up to the target roll out date

