



**CUSTOM SOLUTIONS. PROVEN RESULTS.**





# THE BENEFITS OF PART-TIME SALES MANAGEMENT

## FINANCIAL BENEFITS:

- Higher-level talent and experience without the overhead of full time employment, onboarding or offboarding. You don't have to choose between "affordable" and "capable". You can hire Fortune 500 talent at a fraction of the cost.
- No healthcare costs.
- No paid vacation or personal time.
- Highly targeted solutions allowing for a quick ROI.
- You only pay for what you need, when you need it. Whether short-term management, long-term management, or project-based, you can customize the engagement to your needs.

## ORGANIZATIONAL BENEFITS:

- Training Services: sales training, management training and organizational soft-skills training. Standard or Custom built for your industry. In-person live, virtual live, blended learning, or customized e-learning solutions.
- Coaching Services: one on one in-person, in-field, or virtual. Customized for each sales representative, manager, or future leader.
- Organizational Development Services: OD plan development, standardization of processes, procedures, and toolsets. Onboarding of local or remote teams. Sales and Management training documentation plus train the trainer for continuous improvement.





# HOW IT WORKS

In our first meeting, we will walk you through the list of services provided, case studies from clients, and testimonials from ownership, CEOs, and VPs of Sales and Sales Representatives we've worked with.

After you know what we do, it's time for you to tell us what you think needs to be done to achieve your goals.

We will then conduct a sales and marketing audit. Interview staff (onsite or remote), and can even do field rides with sales reps during a normal day to see the sales approach live, and gauge customer/prospect receptivity and gaps.

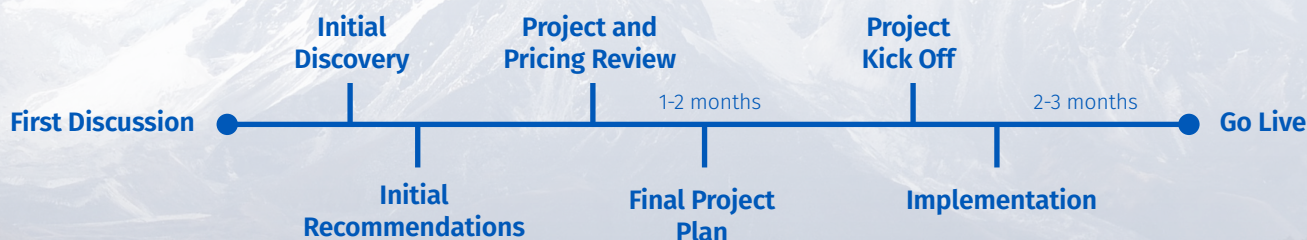
Then we will provide you with a complete findings and recommendations report including program costs, milestones, and deliverables.

You can choose to hire us or implement the recommendations on your own. Either way, the work product produced is yours.

If you hire us then we will put together a project plan for your approval.

Once approved, we will conduct the project kickoff with your staff and move immediately into the implementation phase.

Below is a typical path and timeline.







<b>Industry:</b>	<b>Custom Manufacturing Capital Equipment</b>
<b>Demographics:</b>	<b>60 employees • MI HQ • International</b>
<b>Projects:</b>	<b>Custom Training • OD • Management Training and Coaching • Soft Skills</b>



Since 1992 Automated Process Equipment Corporation (APEC) has specialized in the design and manufacturing of ingredient automation equipment and controls. APEC serves a variety of industries and diverse applications internationally.

We started with APEC in 2014 with the goal of increasing market penetration, sales engineer close ratios, margins, and overall sales internationally. We worked on various projects from 2014-2020, interfacing directly with ownership, leadership, and employees' company-wide.





## PROJECTS INCLUDED:

- EI and DiSC Profiling
- Custom Sales Training
- Management Training
- Soft Skills Training
- Company Image Development
- Proposal Response Package Refinement
- Go-To-Market (GTM) refinement
- VP of Sales, Coaching
- Sales Engineering, Coaching
- Sales Meeting Management
- CRM re-launch and Customization
- Sales Representative Business/Territory Plan Development
- LinkedIn Strategy Development
- Project Management and Engineering Department Training
- Company-wide Communications Program Development
- Owner Strategic Planning

## RESULTS:

- Personality profiling to use in sales manager/sales rep coaching approach.
- Customized sales training manual, deck and tools.
- Customized management training manual, deck and tools.
- Company image and proposal rewrite/rebrand.
- CRM utilization from zero to complete.
- LI and social media presence/footprint and lead gen results.
- Project Management: tightened process, training and tools, ongoing management.
- Communication process, helping to breakdown the department silos.
- Doubling of sales revenue over 6-year span.
- Increase in ASP (average sales rep productivity) year over year.

## TESTIMONIALS:

*Brian worked with the APEC sales team and senior management for a period from 2014 to 2020. Brian helped us in many areas including training of our sales and management personnel, help with CRM integration, help with succession planning, and increasing effective communication between the various departments. His assistance in these areas played a major role in an increase in sales and a more efficient operation among our management team.*

*My main goal in working with Brian was to train our sales team. Our team was very good technically, but lacked knowledge in the finer points of customer relationship management, prospecting and closing of sales. His unique approach put the emphasis on customer service and problem solving, rather than trying to sell the customer something that they don't need. We quickly learned that there were other areas of training that Brian could help us with including management training and interdepartmental communications.*

*I had worked with a business consultant in the past. During that experience it seemed that the person that we were working with was just regurgitating words that he got from us during the interview process. He made some recommendations, and there was no follow up. Brian, on the other hand, not only gave us valuable recommendations, but also gave us a plan to execute and a way to measure the results of this plan.*

*I was extremely happy with the recommendations and changes that Brian brought to APEC. The time that he spent with APEC did so much to build our professionalism and take our sales team to a whole new level. I saw a huge difference in how we planned and executed the sales process and how the sales, engineering and manufacturing parts of the business could be more effective.*

**— Terry Stemler President APEC (retired), April 26, 2022**



*From 2014 until 2020 our company, Automated Process Equipment Corporation, contracted with Brian Nixon of Summit Learning Solutions for consultation and training. As the VP Sales Manager I was initially skeptical and guarded as to why we had to bring in an outside sales expert. I perceived this as an insult to my abilities and the performance of our team.*

*Today I can honestly say that the association, teachings and concepts Brian presented was the BEST thing to happen to APEC, myself and our team.*

*Nothing was forced upon us and we were never told “You are doing it wrong and here is what you need to do”. Concepts were presented and those concepts were supported with material and real life examples. We were free to implement what we wanted and modify what we felt needed modification.*

*Our sales process improved and the results showed. Metrics became extremely important as numbers don't lie! Our sales team learned to ask the right questions at the right time. The team became more efficient and sales revenues increased.*

*After the professional agreement was finished with Summit Learning, whenever our Sales team was faced with a dilemma or puzzling question, the common refrain was “What would Brian say about this?”*

*Personally, Brian helped and challenged me to become a better manager and helped to reshape my thought process. Brian proved to be an excellent sounding board and mentor. Always listening and never judging. He took my input, processed it and presented ideas with supporting evidence. The final decision and action taken was always up to me.*

*Partnering with Summit Learning Solutions was the best business decision made by APEC during my tenure. If you have any hesitancy about partnering with Summit Learning Solutions, cast them aside and forge ahead knowing you are gaining a strategic partner who wants nothing more than for you to grow and succeed.*

**— Dave Mattice VP of Sales (Retired), April 22, 2022**

*Prior to Summit's sales and manager training, our company was very compartmentalized. Summit's training series opened the eyes of staffing in all departments, making them aware of the challenges others are facing within the company. This created a new culture of empathy and wiliness to help each other among teams, it also encouraged improvement on teamwork. In return, this gave APEC improved sales, product quality, and productivity.*

*Before working with Summit, our sales team presented projects to the clients in a very professionally but laid-back manor, this method of sales left it up to our customer to decide our fate. The style of sales also caused closing rates to be like an annual roller coaster ride, making it very difficult to manage production staffing needs, and to generate accurate sales projections. The Summit program gave our sales team the confidence and knowledge to lead the customer through the entire process, including, but not limited to asking for the business. We continue to use and review the Summit program-process with our teams throughout each business year, and we include this training to any new sales or management individual. The confidence building program allowed us to realize growth and consistent sales with major reductions in our past roller coaster adventures, it has also assisted with maintaining product quality, and personal productivity throughout the company.*

**— Kendall Wilcox President and CEO, April 24, 2022**





*Brian Nixon of Summit Learning Solutions was initially hired to work with our sales team. At that time, none of the team had had any formal training in sales. All were engineers or technicians first, salespeople second; sometimes third. Even the VP of Sales. The only difference in the group was time in service as a salesperson and individual people skills.*

*Brian taught us how to lead the customer instead of being led by them. How to present yourself and your products as an ally to the customer along with the material to back it up. Another important aspect was how to create allies within the organization you are targeting. He also taught us the tools and strategies necessary for preparing for the first and subsequent meetings so that you, not the customer drive the agenda.*

*Brian was also contracted to coached us on teamwork between the different departments in the company. Engineering, Sales, and Service work more harmoniously now. It's not all sparkles and unicorns but there is a level of trust and empathy that was not there before. I believe this has led to the company not taking on any jobs that proved to be losers after the sale in these last five years.*

*We have one individual in the sales department who was not making it and came close to getting the axe. What I can only attribute to the time Brian spent with him and our VP of Sales, he came close to being the number one salesperson last year and to date, this year is way ahead of the rest. He's on track to be the number one of all time.*

*APEC is a better, healthier and more performance driven company now thanks to Brian's training and support. Most importantly, it's more profitable.*

**— Garrett Billmire (Partner), May 9, 2022**





<b>Industry:</b>	<b>Public Sector ERP Software (SaaS)</b>
<b>Demographics:</b>	<b>180+ employees • MI HQ • 17 States</b>
<b>Projects:</b>	<b>Out-State Expansion • GTM Strategy • Sales and Marketing Plan • Sourcing Selection and Onboarding of AE and PS staff • Custom Training • Interim Management • OD • Management Training and Coaching • Soft Skills • Hybrid Workforce</b>



BS&A Software has been providing exceptional municipal software to local governments since 1987. BS&A software currently operates in 17 states in the Eastern and Central time zones.

We started with BS&A Software in 2010 with the goal of launching BS&A's Municipal Financial Management software suite outside the state of Michigan. Prior to 2010 BS&A only operated in Michigan and at the time had 62 employees. Today BS&A operates in 17 states and is approaching 200 employees. After successful implementation of the out-state launch, we worked on various projects for BS&A through 2022.





## PROJECTS INCLUDED:

- Multi-state GTM Strategy Development
- Sales and Marketing Plan
- Compensation Program Development
- Sourcing, Interviewing, Profiling and Onboarding Plan Development and Execution
- Custom Sales Training Program
- Custom Operational Training Program
- Company Image Presentation Development
- Proposal and Response Package Development
- Salesforce.com Customization and Implementation
- Soft Skills Training throughout the Organization
- Rewrite of Product Management, Project Management, Implementation and Training Onboarding Documentation
- Executive Coaching for the next generation of Partners
- LinkedIn Strategy Development and launch
- Channel Partner Program Management
- Interim Management of Marketing, Sales, and Product Specialists (product demo team)

## RESULTS:

- Complete buildout of the out-state proactive sales program including all strategic documentation, compensation plans, staff sourcing and selection, training (sales and operational), proposal and response packages, salesforce.com customization, and management tools and programs to sustain YOY growth.
- Helped drive company growth from 62 to nearly 200 employees doing business in 17 states.
- Pre-partner executive coaching.
- Helped create proactive out-state sales to \$13M annually.

## TESTIMONIALS:

*Up until 2010, BS&A marketed and sold our Municipal ERP software to a large percentage of the municipalities in Michigan. Because Michigan municipal government tends to be very close knit, we were able to accomplish this without a professional sales force. In short, we grew organically.*

*However, when we decided to expand our ERP software to municipalities outside of the state of Michigan (to the central and eastern time zones), we knew we had to have a well-defined go to market strategy. But, we weren't sure of the best way to go about it.*

*After a lengthy search of consultants, we hired Summit Learning Solutions.*

*They sourced and hired our first-ever sales team and created the sales and marketing plan to start the process. They designed our sales team's compensation plans, trained them on appropriate sales methodology, and lead our overall strategy. Candidly, we thought they were way too optimistic in their sales projections. It turns out they undersold the possibilities. The program was very successful, very fast.*

*But, then we had several new problems.*

- *We had to quickly ramp up operationally to handle all of the new business. So, Summit Learning helped us quickly source new talent to help us grow.*
- *Then we had to figure out how to quickly train our new staff members. Summit Learning helped us build our new training plan.*
- *Then we had to figure out how to manage through all of our fast growth. Summit put together a number of soft skills training sessions to help us manage the interpersonal issues that popped up.*



- *The fast growth required us to quickly create several new BS&A leaders. Summit helped us here by creating and implementing an executive coaching plan that helped bring our talented young people up to speed.*

*When we started with Summit Learning Solutions we had 62 employees mostly serving the state of Michigan. Now, we have nearly 200 employees serving 17 states; and we're still growing consistently. Moreover, when we started with Summit we sold about 3-5 Million a year in new business; now we sell 13 Million a year in new business.*

*I can say, without reservation, that our success and growth would not and could not have happened without the help of Summit Learning Solutions.*

**— Tom Szur, CEO, BS&A Software**







<b>Industry:</b>	<b>Civil Engineering • Manufacturing • Distribution</b>
<b>Demographics:</b>	<b>40 employees • MI HQ • Midwest</b>
<b>Projects:</b>	<b>Custom Training • OD • Management Training and Coaching • Soft Skills</b>



CSI Geoturf was founded in 1980 by the President and CEO Donn Ellis. Donn founded CSI Geoturf to provide effective civil site construction geosynthetic and landscape products to clients throughout Michigan.

We started working with Donn and his team in 2015 helping to design, write and facilitate a custom sales training program. After launch, we also worked one on one with the sales team in the field to help reinforce the training. Over the years we also helped them with recruiting sales engineers and operational team members, additional toolset builds, as well as providing executive coaching for the next generation of Ellis' to take over the business.



## PROJECTS INCLUDED:

- EI and DiSC Profiling
- Custom Sales Training
- Management Training
- Soft Skills Training
- Company Image Development
- Proposal Response Package Refinement
- GTM refinement
- Sales Engineering, Coaching
- Sales Meeting Management
- CRM re-launch and Customization
- Sales Representative Business/Territory Plan Development
- Project Management and Engineering Department Training
- Owner Strategic Planning

## RESULTS:

- Personality profiling to help increase individual rep effectiveness in the field.
- Complete custom sales and management training documentation and toolset.
- Redesign all sales and marketing literature and tools.
- CRM re-launch and customization to increase rep and ownership usability.

## TESTIMONIALS:

*We experienced significant changes after working with Summit Learning Solutions. The structured approach to developing proper selling habits was just what our sales force of 10 needed. It totally turned around salespeople who had lost the discipline required in today's competitive selling environment.*

*The training was all customized to our market and built alongside our sales team, increasing adoption rate and accountability. While the training was very helpful, what I found even more beneficial were the sales tools that accompanied the training. Training is only worthwhile if execution is accomplished. The tools Brian built with our team provided us the ability to use the training in our everyday prospect meetings.*

*The sales rep profiling and coaching based on that profiling was eye-opening for all of us. Behaviors that we historically couldn't understand made perfect sense once we understood how our reps were driven. The work done on getting our sales team to finally use, and benefit from, the CRM system really paid off. Once they understood that it was a tool for "them" and not management oversight they became invested in it. Then Brian helped us customize it to our sales process and market. After that, we didn't have to "fight" with our reps to use this valuable tool.*

*Probably one of the biggest benefits we received from working with Brian was the business plan and individual sales plan development he helped us with. We immediately pivoted from a reactive team to a more proactive team, getting involved in the sales and decision-making process much earlier than we had been doing over the years.*

— **Donn Ellis (Owner)**

*Brian put his heart and soul into our company. He challenged me to rise above what I thought was "good enough" and helped me produce at a higher level and better quality than I thought possible. We built a thorough business plan, executed it every day, and as a result, we had our best year ever. But what I found most useful was our time together in one-on-one sessions. He did more than coach me. He mentored me and taught me how to be a professional. To take pride in my work and how to make "it" about the customer, not the sale..*

*We were free to implement what we wanted and modify what we felt needed modification.*

*Our sales process improved and the results showed. Metrics became extremely important as numbers don't lie! Our sales team learned to ask the right questions at the right time. The team became more efficient and sales revenues increased.*

— **Nathan Ellis (Sales Executive)**







<b>Industry:</b>	<b>Capital Equipment • Manufacturing • Distribution</b>
<b>Demographics:</b>	<b>110 employees • 5 offices in US • North America</b>
<b>Projects:</b>	<b>Custom Training • Interim Management • Market Diversification • ERP • OD • Management Training Soft Skills • Hybrid Workforce Implementation Remote Selling and Service</b>



**BELMONT**  
**EQUIPMENT & TECHNOLOGIES**  
Divisions of Cleary Developments, Inc.

Since 1960 Belmont Equipment & Technologies has been a pioneer in the EDM Industry. With seven locations, Belmont serves all of North America with complete EDM application solutions, manufacturing, capital equipment and consumables for everything EDM.

We started with Belmont in 2005 and continue to work with them today. For nearly two decades, we've worked on several projects directly with the ownership, leadership and employees company-wide. We consider ourselves blessed to have Belmont as a long-term partner.



## PROJECTS INCLUDED:

- Custom Sales Training
- Management Training
- Soft Skills Training
- Company Image Development
- Proposal Response Package Refinement
- GTM refinement and Diversification Strategies
- Coaching
- Sourcing and Selection of Staff
- Sales Management
- ERP implementation
- Sales Representative Business/Territory Plan Development
- Marketing Strategy Development
- LinkedIn Strategy Development
- Project Management and Engineering Department Training
- Company-wide Communications Program Development
- Strategic Planning
- Hybrid salesforce Management

## RESULTS:

- Custom training manuals and reinforcement documentation and tools for; outside sales, inside sales, customer service, capital equipment sales departments.
- Custom sales tool development including state-of-the-art “Belmont Tools” Kiosk for sales presentations.
- Company wide training initiatives for; soft-skills training, “Belmont Book Club”, EI, etc.
- Strategic development of the market diversification plan into other sectors beyond automotive such as; aerospace, medical, power generation, etc.
- Move from customer site technical sales meetings to fully remote, to hybrid.
- ASP increase 72% of top-tier Territory Sales Managers.

## TESTIMONIALS:

*I first met Brian about seventeen years ago. My brother, Bob, suggested I sit in on a meeting with someone coming in to discuss sales methods and training. In his words, he was afraid we would become “that company” that was really good in their time but time had passed them by. While I believe we were good at that time I could also see what he was talking about.*

*I was a little reluctant because I felt relationship selling was by far the best way to go. It had worked for me for many years and it seemed to be working for most of our existing sales force. I could almost guess the replies to these statements. Things like: we needed to offer more than a relationship because it could cost a customer if someone developed a better relationship or we had to offer benefits, knowledge and benefits competitors were not offering. After meeting with Brian, I gave in and agreed to give it a shot for a month and no more. We had a Sales Manager at the time and he was totally opposed to bringing Brian’s team in. I believe his statement at the time was that “there was nothing they could try or do that he hadn’t already tried or done”. Within that first month, Brian’s methods began to show improvement in our sales results and the sales force began to listen, learning more than they ever had. That helped make a believer out of me. Bob said we should try it for six months to see if things continued to improve. Well, that was many years ago and Brian is still here. We had to make a choice fifteen years ago, when the Sales Manager had made the statement that “he goes or I go”. It wasn’t an easy decision but it was obvious that Brian’s methods were bringing us the results we wanted and our Sales Manager was of “that company” mentality. Today, we are a second generation company, working toward our third. Brian has been an important part of*





that continuation and is like a member of the family. Our sales staff is recognized as being one of the best in the industry. We have had occasions where we have had reason to let salespeople. It seems like every one of them found a job almost immediately. As soon as someone found out that they had been at Belmont, it was the highest referral anyone could give: Wow!!! This guy worked for Belmont and he's available?! Even some of our worst were better than their best. Brian rejuvenated our sales department many years ago and we didn't even know they needed it until he had done it.

Brian has worked with virtually every department in our company. He holds planning sessions with people in accounting, engineering, manufacturing, and, of course, sales. He is as devoted to us as we are to him. Brian is a great team player if ever there was one.

**— Larry Ianitelli (CEO)**

I met Brian in 2005 at a National Tooling and Machine Association dinner meeting. Brian was the guest of one of our board members who introduced us. After talking sales with Brian at this event, I felt it may be a good idea to have him come into our company and do a presentation for myself and my brother, Larry.

Being a legacy company that our father started in 1958, I was concerned that though we were well known in our specific industry segment, we could not rest on how good we were but how good we need to be to survive. I did not want to be known as the company that was "good in their day". We needed to listen outside the company, which was control that was difficult for my brother to give up.

After Brian's presentation, we agreed to hire his company to analyze our salespeople and our sales process. This process took about five weeks and afterward a synopsis of their findings were presented to us. We were impressed with the detail and time taken during this process. They went on calls with our sales team, they interviewed not just sales personnel but also the supporting departments to analyze the interaction, and where the gaps may be that we were not seeing.

After Brian gave us the findings, we had a choice to take that information and act on it ourselves or hire Brian to take the next step of implementation. Even though we had a Sales Manager at the time, who was not a fan of Brian, we agreed to hand the training over. This was met with a mixed reaction. While younger salespeople gravitated to it, the older sales personnel bucked it and had a wait and see attitude. It did not take long for the younger ones to get results. In fact, they were challenging the sales numbers of the established sales group. The sales manager's ego did not like the accolades going to Brian from the younger sales group and gave us an ultimatum, one of them had to go. Brian and I have worked together for the last 17 years, so we know the answer to that ultimatum.

We considered bringing on a sales manager, but we did not think it could come close to the connection Brian developed with our sales group but also us as owners. The biggest compliment to Brian is the old guard sales people eventually did embrace Brian's sales training techniques and it has made them even more successful. Today our question to the customer is "what can we do to help you with your bottlenecks" (and then provide solutions) versus what we asked pre-Brian "did you see the game last night" (which does not help the customer). Today, our competition is constantly trying emulate our sales process but fortunately, they don't have Brian to lead it.

We have the greatest respect for Brian, not only as a businessman but also a family man and a friend.

**— Bob Ianitelli (President/COO)**





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