

# Workshop Summary Report

## Workshop Overview

The workshop brought together the leadership team of an advanced engineering and technical services organisation, alongside external commercial support, to review business development performance, clarify strategic direction, and define a structured approach to revenue growth.

Participants included senior leadership, engineering stakeholders, and commercial advisors, with input also reflecting insights from a key strategic partner and its wider ecosystem.

The primary purpose of the session was to:

- Clarify market positioning and future direction
- Identify commercially viable growth opportunities
- Define a focused and executable sales strategy
- Address immediate financial and operational pressures impacting delivery

The workshop combined strategic reflection (positioning, ICP, messaging) with practical pipeline development activity.

## Key Discussion Areas

### 1. Market Positioning and Identity

- Lack of clarity in external messaging has limited commercial traction
- Need to clearly articulate:
  - Target customers
  - Problems solved
  - Differentiation

Strong alignment around targeting mid-stage engineering organisations that:

- Are beyond concept stage
- Are not yet fully industrialised
- Lack internal capability to complete delivery

### 2. Ideal Client Profile (ICP)

A highly specific ICP was defined:

- Sector: Advanced engineering and technology-led organisations
- Business stage: Between early development and scaled production
- Constraints:
  - Defined but limited development budgets
  - Small engineering teams

- Capability gaps in specialist areas
- Time pressure for delivery

These organisations are:

- Underserved by large providers
- Too complex for low-cost suppliers
- Highly motivated to buy due to delivery risk

### 3. Sales Execution Challenges

- Sales activity exists but lacks:
  - Focus
  - Simplicity
  - Consistency
- Over-engineered planning is preventing execution
- Heavy reliance on relationships rather than structured outreach

### 4. Strategic Partner Relationship

- Strategic dependency identified
- Opportunity to reposition within partner ecosystem

Key observations:

- Partner lacks clear commercial focus and messaging
- Internal misalignment affects ability to sell effectively
- Strong brand credibility and technology remain valuable assets

## Commercial Opportunities Identified

### 1. Technical Recovery / Intervention Engagements

#### Context

Target organisations are failing in later-stage development due to gaps in technical capability.

#### Opportunity Definition

Provide rapid intervention services to:

- Diagnose issues
- Re-establish viable delivery pathways
- Support completion of development

#### Commercial Framing

- High-value project work
- High urgency → faster sales cycles
- Strong pricing power

#### Strategic Significance

- Core positioning
- High-margin
- Repeatable

**Risks / Constraints**

- Requires clear qualification criteria
- Dependent on specialist resource

**Recommended Next Step**

- Define diagnostic criteria
- Build messaging around “recovery and intervention”

**Priority: HIGH**

**2. Strategic Partner Repositioning (Strategic Lever)****Context**

Current positioning undervalues role within partner ecosystem

**Opportunity Definition**

Reposition as:

- Integration partner
- Delivery specialist
- Key regional partner

**Commercial Framing**

- Increased inbound opportunities
- Higher-value engagements

**Strategic Significance**

- Unlocks scale
- Strengthens positioning

**Risks / Constraints**

- Requires partner alignment
- Dependent on demonstrated capability

**Recommended Next Step**

- Define requirements for enhanced positioning
- Formalise proposal to partner

**Priority: HIGH**

### **3. Existing Account Reactivation (Fast Conversion)**

#### **Context**

Multiple historical clients with prior spend identified

#### **Opportunity Definition**

Re-engage dormant accounts

#### **Commercial Framing**

- Lower acquisition cost
- Faster conversion

#### **Strategic Significance**

- Immediate pipeline
- Short-term revenue

#### **Risks / Constraints**

- Some accounts may be inactive

#### **Recommended Next Step**

- Prioritise top accounts
- Execute structured outreach

**Priority: HIGH**

### **4. Product-Led Revenue for Stability**

#### **Context**

Need for consistent baseline revenue

#### **Opportunity Definition**

Drive repeatable product or service sales

#### **Commercial Framing**

- Predictable revenue
- Lower delivery complexity

#### **Strategic Significance**

- Improves financial stability

#### **Risks / Constraints**

- Requires consistent activity

#### **Recommended Next Step**

- Define monthly targets
- Align pipeline accordingly

**Priority: HIGH**

## 5. Diagnostic / Entry-Level Engagements

### Context

Clients require clarity before committing

### Opportunity Definition

Offer short, paid diagnostic engagements

### Commercial Framing

- Low barrier to entry
- Gateway to larger work

### Strategic Significance

- Improves conversion

### Risks / Constraints

- Requires clear scope

### Recommended Next Step

- Productise offering
- Define pricing and outputs

Priority: **MEDIUM-HIGH**

## Insights and Observations

- The primary issue is not capability, but commercial clarity and execution
- Strongest opportunities exist where clients face delivery risk
- Clear market gap between large providers and small suppliers
- Organisation is well positioned to occupy this space
- Strategic partner relationship presents both opportunity and constraint

## Strategic Priorities Identified

1. Define and communicate clear positioning
2. Focus sales activity on high-probability opportunities
3. Build repeatable pipeline process
4. Strengthen partner positioning
5. Stabilise short-term revenue
6. Simplify sales execution

## Risks and Constraints

1. **Cash Flow Instability (CRITICAL)**
2. **Lack of Sales Focus**
3. **Dependency on Key Individuals**
4. **Weak External Positioning**
5. **Partner Dependency**

## Critical Strategic Insight

The organisation is not constrained by capability, but by lack of a clearly defined and consistently executed commercial strategy.

### Why this matters:

- Strong opportunities exist but are not converting
- Without focus, revenue remains inconsistent
- Growth potential is not realised

### Primary constraint:

- Lack of structured, focused commercial execution

### What it impacts:

- Revenue consistency
- Cash flow stability
- Conversion rates
- Growth

### Required shift:

- Define and execute a clear commercial strategy
- Focus on high-value, high-probability opportunities
- Simplify and structure sales activity

## Actions and Next Steps

Action	Purpose
Define ICP and value proposition	Enable targeted sales
Create core service offering	Strengthen positioning
Reactivate priority accounts	Generate immediate revenue
Establish baseline revenue targets	Stabilise cash flow
Formalise partner positioning	Unlock opportunity
Develop diagnostic offering	Improve conversion
Segment pipeline	Increase relevance
Simplify sales process	Improve execution
Define qualification criteria	Focus effort