BLUEEYE ADVISORY



FOR PRIVATE EQUITY

The conversations behind your portfolio's numbers

How BlueEye can help operating partners and portfolio company leaders lift the sales and service conversations a value creation plan depends on.

> **The KPI shows what moved. The conversation shows why.**

WRITTEN FOR

Operating partners and value creation teams
and the CEOs and sales leaders of portfolio companies

HOW IT STARTS

One portfolio company
90 days, then the next company

WRITTEN BY

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01 · THE GAP

What the KPI can’t tell you

Your value creation plan sets the targets. Whether a company hits them often comes down to how its people handle a handful of conversations: The first meeting, the price increase, the renewal, the customer who’s thinking about leaving.

WHAT MOST DASHBOARDS SHOW

What moved

Win rate, deal size, retention and ramp time, by company and by rep. It tells you who’s behind. It doesn’t tell a manager what to coach.

WHAT BLUEEYE ADDS

Why it moved

What the best people at each company say in the conversations behind those numbers, and how close everyone else is to doing the same.

Each company also sells its own way, with different manager habits and a different idea of a good call. So what works at one company doesn’t travel to the next on its own. BlueEye works in that gap, at the level of the conversation itself.

02 · WHAT AN ENGAGEMENT COVERS

01
The standard
Find what the best people at the company do differently in real conversations, and agree on it with leadership.

02
The conversations
Pick the few that move the plan’s numbers, such as first meetings, pricing, renewals and service recovery.

03
Practice
AI role play scenarios and scorecards built from that standard, so people rehearse before a customer hears it.

04
Coaching on real conversations
Live on Zoom, Teams, Google Meet or Webex, or from recordings, with feedback for each person.

05
The Blueprint
Conversation data next to each person’s KPIs, so every manager knows what to work on with each rep.

06
Reporting
Practice, skill and business results side by side, for the company’s leaders and for the deal team.

WHAT IT LOOKS LIKE

At one wealth management firm, a leader who scored 9 out of 100 in the first week finished at 97, and the people who practiced steadily climbed the most.

03 · HOW IT STARTS

One company, ninety days

Ninety days is long enough to see behavior change and short enough to decide what comes next.

DAYS 1 TO 30

Surface

Find what the best people do differently, agree the standard with the company's leaders, and pick the conversations that matter most to the plan.

DAYS 31 TO 60

Teach and push

People practice against scenarios built from those conversations. Managers coach to the same scorecard, on practice and on real calls.

DAYS 61 TO 90

Compound and signal

Measure what moved against the starting baseline, in practice and in the plan's numbers. Then carry the method to the next company.

A GOOD FIT IF

- Revenue runs through conversations: Advisors, sales teams, account managers, or leasing and service teams.
- The plan needs more from the team the company already has.
- Two sales teams have to start selling one way after an acquisition.

PROBABLY NOT A FIT IF

- You want a tool switched on with no one owning adoption.
- The plan has no sales or service team in it.

Who does the work. Mike Levine leads it himself. He was a financial advisor at Merrill Lynch and Morgan Stanley, and a sales executive and learning leader at Merrill Lynch and Bank of America, where the training he built reached more than 10,000 people. Earlier, he ran a multi-state territory with full P&L at ExxonMobil. BlueEye's work started in financial services, with wealth managers, asset managers and banks, including Wells Fargo and Morgan Stanley.

NEXT STEP

A 30-minute conversation

Bring one portfolio company and the conversations its plan depends on. **blueeyeadvisory.com/book**

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