

Quarter Final Round – Seller’s Brief

Your Role

You are a sales advisor at Gartner, with approximately one year of tenure. You sell Gartner for Sales Leaders to mid-sized organizations with complex B2B sales environments.

Your objective in this meeting is to align with the Chief Sales Officer (CSO) on priorities tied to leadership effectiveness and determine whether Gartner’s CSO-focused tools and advisory services should be adopted.

Overview

Prospect Company: IronGate Logistics

Industry: Third-party logistics (3PL) and freight brokerage

Headquarters: Dallas, TX

Employees: Approximately 800

Annual Revenue: Approximately \$650M

What the Company Does:

IronGate provides freight brokerage, intermodal coordination, and regional warehousing services for manufacturing, industrial, and consumer goods customers across the U.S.

Go-to-Market: Direct B2B sales organization

- 70 to 80 inside sales reps for transactional freight
- 15 to 20 field-based account executives for managed transportation contracts
- 5 strategic account executives.

Customer Base: Mid-market manufacturers and distributors.

Market Position:

IronGate Logistics is a Tier 2 regional logistics company.

Other Relevant Stakeholders:

- Jeff Baxter – Chief Executive Officer
- Casey Kemp – Chief Sales Officer (the person you are meeting with)
- Ann Wilson – VP of Sales
- James Hendrix – Director of Sales Operations

Meeting Context:

You are meeting with Casey for the second time following an initial need-discovery meeting two weeks ago. During that meeting, Casey shared several key issues and agreed to meet again to explore potential solutions.

Recap of Previous Meeting

Casey is new to the CSO role. His last position was Vice President of Sales for a competing firm, where he gained substantial experience managing salespeople. However, as CSO, Casey now oversees both sales and sales operations and needs additional support understanding the scope and complexity of this expanded role.

During the first meeting, you learned the CEO wants IronGate to be a \$1 billion company by the end of 2030. And as first steps toward making that happen, he has tasked Casey with two major objectives for 2026:

1. **Assess the cost and effectiveness of the sales arm of the organization** and make recommendations for improvements (e.g., improving the sales force structure, increasing retention, ensuring compensation is competitive, etc.).
2. **Develop a clear, coordinated AI strategy** that reduces sales admin time, improves forecast accuracy, and prevents tool sprawl across the sales organization.

Decision Process

You learned IronGate uses the following decision process when considering bringing on new partners/vendors:

1. Determine if the vendor/partner is capable of bringing value to the relationship.
2. Assess the ROI.
3. Assess overall operational fit.
4. Compare with competing alternatives.
5. CSO makes the final decision.

During the first meeting the CSO determined the fit potential was sufficient enough to give you a second meeting.

Objective 1 - Assess the cost and effectiveness of the sales arm of the organization and make recommendations for improvements (e.g., improving the sales force structure, increasing retention, ensuring compensation is competitive, etc.).

Situation

The CEO wants the assessment because he is worried about sales force retention and sales channel effectiveness. In past two years, IronGate lost several of its top salespeople to competitors. In addition, the CEO is concerned IronGate's mix of inside salespeople, field-based account executives, and strategic account executives is suboptimal for growth.

To gain relevant insight for the assessment, Casey has been gathering related data from his/her direct reports Ann (VP of Sales) and James (Dir. of Sales Ops) and doing research via Google and ChatGPT.

Challenge 1:

The data and information Casey has gathered so far about salesforce structure, sales operations, sales enablement, and compensation is overwhelming and difficult to synthesize. In particular, Casey has yet to find any discernable connection between sales channel structure and sales performance. In terms of compensation, the VP of sales believes her sales team is underpaid while the Director of Sales Operations believes they are not. Finally, Casey lacks the benchmarks necessary to compare IronGate's sales structure and compensation to other successful regional logistics firms.

Consequences

The CEO estimates sales force turnover and sales operations inefficiencies are costing the company \$10 to \$20 million annually.

The CEO also believes if Casey is able to "right the ship," Irongate could grow revenue by 15% annually.

Objective 2 - Develop a clear, coordinated AI strategy . . .

Situation

Casey has explored AI through personal research (ChatGPT, LinkedIn groups, vendor demos), but the information is contradictory and overwhelming. Several sales managers have independently purchased AI-enabled tools, creating scattered, uncoordinated adoption across the sales org.

Challenge 1:

Ineffective information gathering: The information Casey has gained is often biased, inconsistent and sometimes contradictory. Casey has yet to develop a clear and reliable understanding of how AI can support sales and increase productivity.

Tool sprawl and lack of centralized coordination: Multiple teams are experimenting independently, leading to duplication, inconsistent workflows, and no clear metrics.

No clarity on ROI: With hundreds of "AI-enabled" tools available, Casey has not found credible evidence identifying which AI use cases actually increase sales productivity or generate a positive ROI.

Sales Ops is overwhelmed: Sales ops cannot support multiple disconnected tools, trials, and other integrations of AI.

Consequences

Without a unified AI strategy, IronGate risks wasting money on duplicative tools, overwhelming reps with inconsistent processes, and missing genuine opportunities to improve productivity and forecasting accuracy. Casey fears falling behind competitors who are implementing AI more strategically.

A comprehensive strategic plan for effective AI integration into the sales arm of the organization may improve productivity and help IronGate hit the \$1B sales target by 2030. It would also demonstrate Casey's value and effectiveness as a CSO.

Issue for Casey

Since Casey is new to the CSO role, he/she is still gaining confidence in leading at the executive level. Casey needs guidance on how to communicate effectively across the organization, especially with Sales Operations, and how to make data-driven decisions with the right benchmarks and best practices.

Budget: Casey shared with you that his 2026 budget has little room for investment in consulting services. He will need to see a clear and definitive ROI before moving forward with any sort of agreement.