



## CLIENT SUCCESS STORY

# CapTech Consulting

## CapTech's Approach to Account Growth and Sales Coaching Fuels Success

### Background

As CapTech, an award-winning technology consulting firm, set ambitious growth goals, the need for a more structured approach to account growth, client retention, and long-term account management became clear.

"Our previous approach to account management was informal and inconsistent," shared Daniel Coulbourn, Director of Learning and Talent Leadership Development at CapTech. "While we had solid account run book and processes, we needed a common language and a framework everyone could embrace and integrate into our culture."

To achieve sustainable success, CapTech had to address another vital component: sales coaching.

"Coaching had been a low priority and occurred infrequently," Coulbourn added.

Despite previous attempts at sales training, success has been elusive.

"We even tried internal training, but it didn't resonate. With our growth goals in mind, we began assessing different vendors," said Coulbourn.

After a thorough evaluation, CapTech partnered with RAIN Group, a global sales training company.

"I had followed RAIN Group for years, read their white papers, and appreciated their research-driven approach. Their [Strategic Account Management Competency model](#) particularly resonated with me," recalled Coulbourn.

### Solution

Recognizing the integral role of leaders in this initiative, CapTech focused first on [sales coaching](#). Leaders engaged in comprehensive modules covering topics, including leading sales coaching conversations, driving team change, managing and coaching for action and accountability, motivating teams, and creating actionable plans.

CapTech's sales managers, responsible for running application coaching with their team, also completed Train the Application Coach.

With sales professionals at different career stages, CapTech aimed to align skills and approaches. Sellers first completed [Consultative Selling](#) modules, where they learned how to lead a needs discovery, make a compelling ROI case, and inspire buyer action using a buyer change blueprint.

The journey continued with [Strategic Account Management](#) modules that covered topics such as growing strategic and key accounts, driving value through Value Labs, stakeholder analysis, competitor analysis, and account pipeline development.

"I coached teams on running Value Labs, which was incredibly insightful. Bringing the team together intentionally fostered a cross-pollination of ideas," noted Coulbourn.

The program culminated with [Coaching for Action and Accountability](#) for managers, while sellers took part in a 90-Day Sales Achievement Challenge, receiving ongoing coaching for accountability as they embedded their learnings into their daily efforts.

### Results

The initiative has driven immediate and profound changes across CapTech, significantly impacting how leaders and sellers approach client relationships.

CapTech experienced remarkable improvements in pre- to post-training confidence scores. Confidence is the forerunner to competence. Lack of confidence precludes effort, and where other measures are easily affected by external forces, confidence lift is directly attributable to training. Improvements include:

- **70% increase** in developing a thorough needs discovery plan
- **50% increase** in communicating the impact of a solution through a more powerful ROI case
- **32% increase** in neutralizing, unseating, and protecting accounts from competitive threats
- **20% increase** in driving new opportunities with accounts based on value

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Leaders also reported a **56% boost** in their confidence in coaching conversations that drive accountability and ownership in sales meetings.

“We quickly applied what we learned. The strategic account planner is now integrated in our CRM for planning in Salesforce. The buyer change blueprint has been instrumental in our RFP responses, and the feedback has been overwhelmingly positive. We’re also requiring this for our top 30 accounts, and adding a challenge,” said Coulbourn.

Additionally, CapTech experienced breakthroughs in sales coaching.

“Leaders are actively applying coaching techniques and developing detailed coaching plans,” said Coulbourn.

Historically, CapTech’s focus had been transactional, emphasizing problem-solving without truly understanding client needs. Sellers also often felt uncertain about how to serve as strategic account managers. Now, they have a clear and actionable path forward. The tools and processes introduced have garnered overwhelmingly positive feedback.

“The biggest change has been in our mindset. We are transitioning from seeing our roles as billable consultants to viewing relationship-building as essential to deepening client connections and understanding value from the client’s perspective. A customer-first approach is at the core of our transformation,” Coulbourn explained.

While CapTech had a rigorous onboarding process, the development pathways were unclear. To address this, Coulbourn launched CapTech U.

“We lacked formal learning capabilities, and our approach was a scatter plot. We created CapTech U to unify our people, processes, and systems. We designed learning pathways for beginners and advanced professionals, ensuring access to resources, mentorship, and coaching for ongoing development.

RAIN Group’s training was pivotal in shaping our curriculum for the School of Account Management and Business Development within CapTech U, allowing us to provide structured development in these critical areas,” Coulbourn explained.

CapTech’s commitment to fostering a culture of continuous learning is evident in their plans to deepen their partnership with RAIN Group.

“Our long-term vision includes initiatives like Train the Trainer, multi-year licensing, and content integration into our LMS. We’re also planning to incorporate quarterly refreshers and train 50-75 new learners, including our subject matter experts. This ensures our team remains equipped with the skills they need to excel,” said Coulbourn.

## Participant Feedback



“Excellent framework, content, and instruction. I appreciate the pre-work that leads to the live session, followed by the post-work.”



“I wish I had taken this two years ago! This was an amazing program.”



“The program surpassed my expectations regarding the overall utility and quality of the content.”



“Great quality, learned new things, and loved the breakout and coaching sessions.”



“Loved the pre-work and continuity of that learning in these sessions, focusing on changing behaviors and taking new actions.”

“The training has equipped us with a common approach to Consultative Selling and Strategic Account Management that is integrated in the existing framework and has driven measurable results.”

Daniel Coulbourn, Director of Learning and Talent Leadership Development at CapTech