



**SUNSTONE  
MANAGEMENT  
ADVISORS**

The Helm:  
**January 2026**

**GUIDING HEALTHCARE LEADERS THROUGH STORMY MARKETS AND CHANGING TIDES**

Welcome to the 2nd edition of The Helm, Sunstone's executive briefing for Healthcare and Insurance leaders navigating growth, transformation, and scale. Each month, our Operating Partners share real-world insights from complex engagements to help leadership teams see beyond the horizon and build the capabilities required to turn opportunity into sustained results.

Like the ancient Vikings who used the Sunstone to find their path, we are ready to help you plot your direction, and chart a course for a successful journey.

Please let us know if you have any recommendations for topics/content for future editions of The Helm, or ways we can make it more valuable to you.



**Mike Murphy**

Founder and Managing Partner



**Joe Rolewicz**

Founder and Managing Director

**Headwinds & Currents**

Some of our Healthcare, Insurance and Service firm clients are facing a familiar paradox:

- Strong offerings
- Strong leadership
- But growth has stalled

Why? Because many organizations are built around:

- Founder-led selling
- Account management that is not scalable
- Informal processes
- Undocumented strategies

These models can work initially, but ultimately collapse under scale.

## SMA Client Voyage

### The Client's Storm

A wholesale distributor offering private-label outsourced benefit service with a strong value proposition to insurers saw early market traction. Soon challenges emerged including:

- CEO was the primary “closer”
- Sales teams were ineffective
- Account managers were actually operational staff
- Distributor partners produced minimal same-store growth
- Besides CEO to client C-suites, relationships were inconsistent & reactive

Growth existed, but it was too episodic, not scalable, not predictable and not transferable.

### Viewing Through the Sunstone



- **Sales & Account Management Redesign**
  - › Rebuilt the sales and account management processes
  - › Defined clear SOPs and workflows
  - › Created Business Development and Strategic Client Relationship Model
  - › Tightened unique selling proposition (USP) messaging
  - › Deployed CEO away from tactical sales activities
- **Role Clarity & Capacity**
  - › Redefined the Account Manager Role
  - › Created Distributor Sales Support for wholesale clients
  - › Removed operational staff from front-line selling
  - › Introduced consultative sales discipline and presentation models
  - › Launched structured business development processes

## ● Incentives & Performance

- › Designed new compensation and incentive programs
- › Introduced individual goals, activity tracking and reporting
- › Created predictable performance management

## Signals



32%  
CAGR



50+%  
Close Ratio



Successful  
Recap & Exit

*Founders can create momentum. Systems create scale. If growth depends on one person, you make your company look small and inconsequential.*

## Compass Points



- Design the Growth Engine – sales, account management and distributor models must be engineered – not improvised
- Separate Sales from Operations – operational excellence doesn't equal commercial success
- Align Incentives to Strategy – people do what they are paid to do, especially in sales
- Equip the Front Line – tools, proposals, data and workflows drive confidence and conversion

## Set Your Heading



- Recognize the difference between a growth problem vs. a sales operating model problem:
- Role clarity
- Formalize and document workflows
- Define client ownership, discipline and accountability
- Align performance management and incentives
- Otherwise, growth will depend more on heroic efforts instead of reliable execution.

## Book a Complimentary Voyage Briefing

Click to  
Book a Call



If our perspectives on growth, transformation, and value creation resonate with you, let's schedule a brief introductory call. We'll listen, learn, and explore how our paths might align—no obligations, just dialogue.

**Are You Ready to Be Extraordinary... To Go Beyond...?**

**[www.sunstonemanagementadvisors.com](http://www.sunstonemanagementadvisors.com)**

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