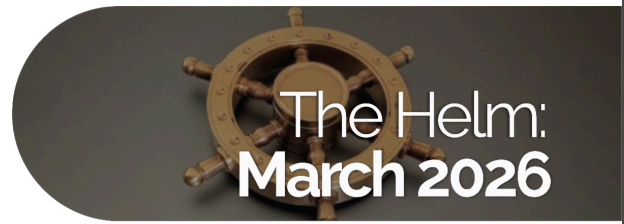


**SUNSTONE
MANAGEMENT
ADVISORS**



GUIDING HEALTHCARE LEADERS THROUGH STORMY MARKETS AND CHANGING TIDES

Welcome to the March 2026 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.



Mike Murphy

Founder and Managing Partner



Joe Rolewicz

Founder and Managing Director

Headwinds & Currents

When expanding into new markets, there are challenges in building an effective sales team and marketing strategy. Having a competitive product does not guarantee traction. Just because you "build it", does not mean "they will come". Success derives from:

- Analyzing the market – focus on robust opportunities
- Clearly differentiating products and marketing messaging
- Understanding the dynamics and timing aligned with relevant KPIs and financials
- Building a sales process, a CRM, activity targets, and incentives that track to the market strategy

SMA Client Voyage

The Client's Storm

A Third-Party Administrator (TPA) focused on large self-insured clients with unique needs or in markets where its networks were competitive. The organization sought to expand by investing in

a national sales team across twenty new markets. Two years in, results significantly lagged expectations. Key challenges included:

- Declining book of business and limited sales
- Sales revenue insufficient to cover sales team costs.
- Sparse new market recognition
- Salesperson retention - lack of sales driving lower commissions

Viewing Through the Sunstone



Our Perspective – performed a root cause diagnostic to understand key sales and account management activities and results:

- Are timelines realistic?
- Do all target markets represent the same opportunity? What is the level of entrenched competition?
- Is marketing collateral reflecting a differentiated message? Is outreach inspiring local decision-makers?
- Are sales processes following the market development strategy? Are incentives aligned, sales tools optimal, account executives performing vs. expectations?

Signals



**5X Increase
In New Business**



**250% Increase
In Sales Activity**

**CRM implementation
Pipeline visibility and
sales discipline**

Align sales execution and messaging with a cogent local market strategy.

Compass Points



- Validated markets with clear opportunity; exited others
- Developed product improvement strategies for marginal markets and continuously enhanced differentiators
- Restructured Sales Team responsibilities and processes - Aligned market development with pay and performance criteria
- Implemented a CRM

- Streamlined Sales Team - Focused on talent and strong local ties in high opportunity markets
- Developed new messaging and corresponding marketing materials
- Modified target segments to match marketing strengths

Set Your Heading



- Be conservative in establishing timelines to enter new markets. Disrupting current buying patterns takes time
- Allow for sunk sales costs from compensation bridges for your sales team as it moves from developing deal flow to realized revenue
- Build incentive compensation to reward market building success, avoid guarantees
- Use incremental mileposts to assess progress in market development

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