Success stories: Herz Valves UK Ltd

At Herz Valves UK Ltd, they faced a common but critical challenge: inconsistency in how their Regional Sales Managers (RSMs) reported performance data. There was variability in the depth, format, and insight provided, leading to difficulties identifying trends, tracking pipeline progression, and holding effective commercial conversations across the business.

As UK Sales Manager, Neil Gatland saw an opportunity not only to fix this issue but to embed a culture of accountability and motivation using tools we'd explored through the Driving Performance training course led by Sue Reed – especially Clarity4D.

> Through the Clarity4D programme, I discovered how much more effective leadership can be when you understand the personality preferences of your team. This insight helped me realise that while I may favour structure and pace, others may value reflection, inclusion, detail, or inspiration. To drive performance across the team, I needed a tool that catered to all these styles – and inspired engagement rather than enforced compliance. I built the Sales Meeting RSM Report Template with one goal in mind: to enable every RSM to deliver insightful, complete, and useful information – in a way that fits their personality style.

Here's how the template supports each colour energy type, drawing directly from both Clarity4D principles and Thomas Erikson's framework:

	Personality Traits	How the Report Engages Them
Red Energy	Action-oriented, goal-driven, time-conscious	Clear KPI fields, structured layouts, deadlines, and expected outcomes
Yellow Energy	Energetic, visionary, people-focused	Open sections for ideas, wins, anecdotes, customer interactions
Blue Energy	Detail-oriented, analytical, rule-focused	Data fields, quote follow-up logs, trend tracking, market intelligence
Green Energy	Supportive, consistent, process-focused	Space for reflection, SWOT analysis, personal commentary, team collaboration prompts

Erikson emphasizes that 'people are motivated by completely different things' and warns against a one-size-fits-all approach to leadership. This reporting tool, by contrast, tailors to each type. By building the report with these preferences in mind, engagement at Herz increased significantly, with several key benefits noted:

- 100% compliance in completing reports
- More quote follow-up activity
- Enhanced forecasting and customer prioritisation
- Improved sales meeting quality, focused on insights not updates
- Increased accountability and engagement

Clarity4D

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Beyond engagement, they are now seeing commercial benefits:

- Better conversion rates from quote to order
- Reactivation of dormant accounts due to visibility and insight
- Early identification of trends like competitor discounting or market slowdowns
- More focused market segmentation efforts based on real-time feedback

It also supports their People – Process – Performance approach:

- People: Empowered with clarity and coaching
- Process: Structured and repeatable
- Performance: Aligned to commercial objectives

Driving Performance Going Forward - embedding this into their culture:

- Sales meetings now require submission of this report as a standard practice
- Monthly team calls feature a 'one insight each' sharing slot
- Ongoing coaching conversations built around the data
- Integration of SMARTER goal setting into performance reviews
- Use of Clarity4D in onboarding new team members to personalise management from day one

"I like how the new report gives me space to talk about customer wins. It's not just numbers anymore, it's meaningful."

"It's really clear what's expected of me now. It's structured and efficient — exactly how I like to work."

"The SWOT section has helped me think more strategically about accounts I used to overlook."

"By combining insights from **Clarity4D**, **Sue Reed's Driving Performance Programme**, and **Thomas Erikson's *Surrounded by Idiots***, I was able to turn a simple reporting tool into a performance-enhancing, engagement-boosting, insight-generating engine. The tool works because it reflects what all high-performing teams require:

- Structure for those with high red energy
- Inspiration for those with high yellow energy
- Detail for those with high blue energy
- Support for those with high green energy

And, most importantly, it respects that different people need different things to thrive."