

# FINANCIAL SERVICES SALES



# FINANCIAL SERVICES SALES

## Profile of Client

- Company Size - 55,000
- Industry- Financial Services
- Turnover- US\$ 33.47 billion (Global)

## What were the initial challenges the client had that could be helped with our services?

- To move from a 'comfortable' account management-type mindset to a sales-focused one...rapidly (hence Accelerate as the programme name)
- To ensure that first level leaders moved from being 'organisers of bodies' towards being true sales coaches
- To deliver change across Europe – ensuring consistency across 8 different markets
- To ensure that the business continued to grow to meet aggressive targets

## Why were we selected as the partner to provide the solution?



**Transform Performance International has worked with this client since 2006. We have a track record of success and a trusted relationship**



**Ability to design and deliver truly blended change programmes, in local language and utilising existing Transform Performance International materials and unique research for the Salesperson's Secret Code, which is a robust body of research which has identified the belief systems which drive top salespeople**



**Ability to scale and to be flexible: this involved almost 700 people across Europe**



**Ability to create a multi-year programme to deliver results and align to their business objectives**

# FINANCIAL SERVICES SALES

## Why did we put together the solution we did for the client?

- Because it best suited the client's circumstances
- This was a complex solution which included:
  - Face to face workouts
  - Webinars
  - Use of psychometrics, including the market-leading Salesperson's Secret Code diagnostic
  - Provision of materials (slides, documents videos etc.) via an online portal
  - Individual coaching sessions
  - Observed coaching sessions
  - Streams of learning covering three layers of management
  - Review of sales processes and creation of sales playbook for sales and leaders
  - Learning needs analysis to identify learning gaps and provide data-driven insight on capabilities, skills & behaviours
  - External insights from world-class organisations

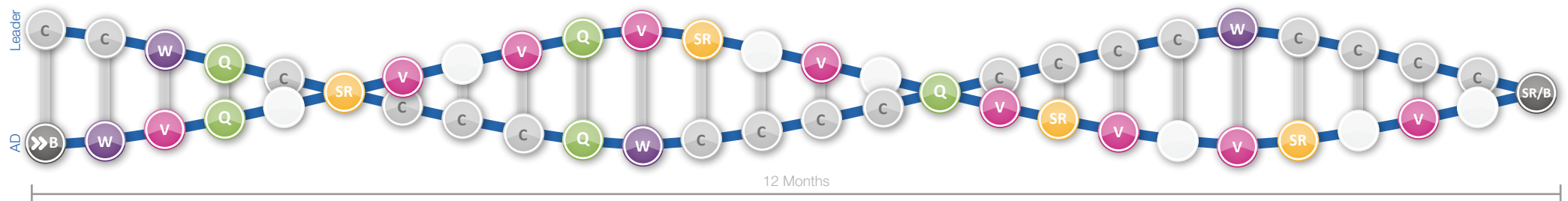
## How have we helped the client since the initial implementation/introduction?

As the client progressed through their transformation project during year one, there was a need to upskill and include the new business sales teams on the same journey to ensure consistency, a common approach and align to the desired performance outcome. Year one of the transformation focused on the skills and behaviours people needed in order to be successful in their roles. Year two of the transformation focused on developing mindsets, beliefs and attitudes to drive behaviour and success to the next level.

## What kind of success did the client enjoy with our solution?

- Double digit growth
- Retention of top performers
- Increased client retention and growth from within accounts
- Cultural change with a focus on high performance and removing limiting beliefs
- A true sales coaching culture from leaders
- The change in mindset from all levels of the organisation; the breaking down of limiting beliefs to exploring the art of the possible.

# Year One - Accelerate Learning Pathway



## Launch



- Engage the community
- Set a sense of anticipation and intrigue
- Motivate, energize and inspire the group
- Paint the journey
- Contract and commit

## Benchmarking



- A quick online 'development prioritiser' survey the output of which will identify the gaps and areas to focus for each participant – this can be 180 degree.
- An online sales centric psychometric survey, the output of which will be shared at the first webinar

## Workouts



These are 1 day transformational workouts that focus on mind-set and behaviour change congruent with the programme goal

## Quest Challenges



- A series of sales focused challenges that relate to the content that has been delivered
- The Quest Challenges will be designed to be enjoyable, stimulating and relevant. Above all they will take participants out of their comfort-zones and they will kick-start the process of forming new habits and behaviours
- This supports a 70:20:10 model

## Vitamin Pills



- A series of 90 minute face to face interactive 'thought leadership' sessions
- Relevant bite-sized learning facilitated by Transform Performance to include (illustratively):
  1. Dealing with challenge & pushback
  2. Your unique value – USP
  3. How to eat an elephant!
  4. Compelling relevant sales emails
  5. Your top 5 stories
  6. Your 5 challenging conversations
  7. Know your ABC
  8. Enrich your language
  9. Technologically in touch

## Success Reviews



Scheduled success reviews are a really powerful way of setting an expectation of a desired outcome. Correctly framed, these will compel participants to focus on successful application; and by implication they will move the accountability for success into their hands.

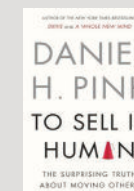
## Coaching (from leader)



An important success criterion will be the full engagement of the participant's leader. This will involve coaching at key moments and taking responsibility for the successful 'graduation' of each participant that they lead. Leaders will receive 1-1 coaching from a TPI sales coach throughout the course of the programme.

## Resources

The participants will be expected to engage with inspirational book summaries and videos that are relevant to the desired sales behaviours



# Year Two - Accelerate Guiding Principles

## Leadership

Deliver a programme that both supports leaders to truly drive a culture of change management whilst taking accountability

## The Sales Person's Secret Code

Ensure that all learnings offered to frontline and leaders are mapped to the latest global sales research

## Learning

Design a programme which encompasses not only training but all methods of learning with clear application and adoption of new behaviours across the business

## External Insights

Transport learning from the best of the best in what they do back into the business; share insight from some of the most successful organisations in the world

## Best Practice

Create a culture that promotes best practice across the salesforce and fosters a philosophy of modelling

## Outcomes of the Accelerate Programme



## Transform Performance International

Transform Performance is a performance transformation consultancy specialising in working with global clients to change culture, behaviour, mindsets and beliefs. We partner with our clients to unlock their potential for delivering business results that matter with the people who make it happen.

## Contact

[info@transformperformance.com](mailto:info@transformperformance.com)

tel: +44 (0)1488 658686

[transformperformance.com](https://transformperformance.com)

## What our delegates say-

- “Extremely positive experience due to the exchange of real business challenges we face, sharing of ideas, receiving other people’s feedback, learning new approaches and new techniques”
- “Great experience for networking and brainstorming. I learned how to leverage ideas and structure team meetings”
- “Very good, useful to understand the psychology behind top performers”
- “Opened my eyes on how you can drive performance in sales by changing behaviours”
- “It was great to talk as a group openly about what we believe in- this has been highly beneficial”