



CASE STUDY – SUPER REGIONAL BANK

PROBLEM:

We started to work with the President of one District within the bank who was familiar with our sales development approach from another bank and was committed to taking his district from #15 to #1. We assessed his sales management and sales team with the OMG #1 sales evaluation which provided an in-depth diagnosis of how the bank's systems and processes, skills and weaknesses were impacting the team results. Additionally, each salesperson and manager received their individual results providing them with actionable information on how to improve. We met and reviewed the top-level results with the leadership team, discussed the strategies to address the weaknesses, developed the plan of attack and began to work.

SOLUTION:

Their sales development program began with the Sales Managed Environment® Quick Start Program, training all the sales managers on a consistent way to set standards, coach, motivate, recruit and upgrade the sales force. This in-depth program included specific approaches to setting goals (personal and professional), holding sales meetings and huddles, developing Success Formulas for every salesperson, establishing the right hiring profiles for successful RMs in their bank, scheduling intentional coaching sessions. These strategies were delivered in an integrated program of live instructor led sessions, interactive live webinars, online learning and one of one phone coaching. After the first 3 months, we then began to train the salespeople on the Effective Selling System (ESS), tailored to the bank's selling system and with all managers actively present. This helped to train the managers on how to coach their salespeople on effective selling. Our ESS training covered a systematic approach to prospecting, qualifying and closing focused on deepening current client banking relationships as well as acquiring new clients. All Relationship Managers in all LOBs were involved.

RESULTS:

Like most banks, leaders and salespeople are effective banking specialists, but do not always have the sales skills necessary so the assessment and training was eye opening. Because consistent sales management strategies across all lines of business were implemented, this brought the teams together with the same activities and reporting. This provided the President with systems and processes he could monitor and manage for greater sales management and forecasting accuracy. Salespeople became more adept at referring business across business lines due to the consistent sales process they followed.

The #15 District President became the #1 District the following year with double digit topline growth.

OUTCOME:

The results from this one district took us to the corporate tower where we began working with the entire Bancorp across their footprint. 10 years later, this bank has adopted our sales and sales management strategies into their culture and call it their "Sales Managed Effectiveness Program". We continue to work with them on growing their revenue across all their primary business lines.