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CASE STUDY: SALES PERFORMANCE IMPROVEMENT

Increasing Activity and Forecast at a Global Banking Institution

Client's Business Objectives:

- Introduce an activity-based culture with visibility
- Find new business opportunities in existing accounts
- Increase revenue forecasts

Client's Sales Performance Improvement Challenges and Needs:

- Review understanding of activity-based close ratios (create awareness - Reality vs. Fiction)
- Time management (hours/efforts/results)
- Qualifications (individual AE and sales managers)
- Overly optimistic Forecasts (90 day window)

The Complete Sales Factor Solution – E's to ROI:

- **Examination** and Benchmarking of Behavioral Skills and Key Metrics
- **Execution** and Implementation of the Sales Opportunity System (SOS)
- **Execution** and Implementation of the Digital Sales Opportunity System (SOS) on client intranet
- **Execution** of the 9 week Sales Sustainment System (SSS)
- **Evaluation** Measurement with bottom-line tracking

The Facts:

- Benchmark obtained at Initial SOS Session
- Qualified New Business Activities – up 173% by week 9
- Total Forecast (Revenue) – up 100% by week 9
- Total Forecast & Sales – up 156% by week 11 (100% by week 9)

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