

## 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)

