

HELPING
CLIENTS
SUCCEED.

CASE STUDY

GLOBAL PROFESSIONAL SERVICES FIRM:
READY FOR A SHAKE-UP IN THE MARKETPLACE

A BIT OF BACKGROUND AND CONTEXT

The client, one of the world's largest professional services firms, faced a formidable challenge. A forthcoming regulatory change would substantially impact their current client base in the EU (their largest revenue generator).

WHY THE CLIENT NEEDED HELP

The imminent regulatory change would require certain types of customer organizations to select new auditors after a set number of years. At the time, the client provided audit services for 45% of these organizations, which positioned them for significant losses. On the plus side, the client would have an opportunity to pursue the remaining 55% as potential new clients as those organizations' contracts with competitors came due.

Historically, the consulting partner's role was to maintain and penetrate existing accounts. In the new business environment, partners would need to implement best-in-class prospecting skills to pursue new business. Plus, they would have to establish and develop relationships with prospects well before these organizations were required to change auditors.

Since prospecting had not been one of the partners' primary accountabilities, we knew we needed to help them think more strategically about potential customers. They would have to expand their research and networking skills. They would also need to generate enough interest to engage targeted prospects in mutual exploration of the connections between the prospect's business needs and the value proposition our client had to offer. The partners would have to become adept at positioning themselves as the audit partner for the future and work to develop advocates across potential customer organizations.

INDUSTRY

GLOBAL PROFESSIONAL SERVICES

SOLUTION

HELPING CLIENTS SUCCEED[®]

FILLING YOUR PIPELINE[®]

QUALIFYING OPPORTUNITIES[™]

SPEED OF TRUST[®]

FRANKLINCOVEY CREATED
A LEARNING JOURNEY
THAT ADDRESSED PIPELINE,
QUALIFICATION, AND
TRUST-BUILDING SKILLS.



Qualifying Opportunities[™] helps sales professionals learn how to uncover and understand their clients' needs faster and more effectively in order to identify a solution that exactly meets the client's needs. It's just one part of the *Helping Clients Succeed*[®] methodology.

WHAT WE ACHIEVED TOGETHER

FranklinCovey customized a learning journey that included content from our *Filling Your Pipeline*[®], *Qualifying Opportunities*[™], and *Speed of Trust*[®] programs. Participants completed a weekly playbook for several months post training with activities and videos designed to help them apply the skills they learned in the classroom to interactions with clients and prospects.

The client wanted to facilitate this program moving forward, so we created a train-the-trainer certification to align with their program. Our goals were to help internal trainers gain confidence and competence with the content and enhance their coaching and facilitation skills. FranklinCovey's expert facilitators worked closely with the selected leaders in a live, three-day workshop. We then co-taught with them to assess their progress before they took over the program themselves.

A critical part of our approach is to integrate new skills and knowledge within our clients' current systems and processes, as needed. This client already had their own sales tools and wanted to retain them. We were able to integrate those tools into our content and connect them to the skills we teach in our programs.

WHY IT MATTERS TO YOU

Due to an impending change in the regulatory environment, this client needed to provide its consulting partners with training in the areas of prospecting, qualifying, and building trusted relationships. FranklinCovey created a learning journey that addressed pipeline, qualification, and trust-building skills and included sustainable learning activities that participants completed after the live workshop.

FranklinCovey's work with this and all of its clients exemplifies our commitment to sustainable development and our flexibility in adapting core content to our clients' organizational needs. What does your sales organization need to meet or exceed its goals? FranklinCovey can help you achieve sustainable results with its award-winning sales effectiveness programs.

ABOUT FRANKLINCOVEY'S SALES PERFORMANCE PRACTICE

We help sales leaders and learning and development professionals to evolve sales teams, personally and professionally, to enhance performance, achieve sustainable results and gain the ultimate competitive advantage. Through sales training, consulting and coaching, FranklinCovey clients execute consultative selling skills and build capabilities around pipeline growth, rigorous qualification, negotiation, closing, effective sales planning and process, sales leadership and sales management.

For more information about FranklinCovey Sales Performance solutions, contact your client partner or call 1-888-705-1776. You can also visit www.franklincovey.com/salesperformance.

MORE ABOUT HELPING CLIENTS SUCCEED[®]



Helping Clients Succeed[®] is FranklinCovey's award-winning methodology that teaches sales teams how to become remarkably better at the person-to-person aspects of sales and become trusted advisers to their clients by seeking first to understand their clients' needs and then working together to create win-win outcomes that benefit both sides.