

REAL RESULTS CASE STUDY

Enabling Growth for Professional Services

Background

An established financial services company was relying on their reputation and existing customer base for sales. While this model was sustainable for their size, the small business was committed to growth and knew they needed to formalize a sales and marketing strategy and increase new business outreach to do so.

The Solution

The Seattle-area company selected SRi “because they are consulting focused – able to work with our size of business, proximate to us for ongoing availability, and experienced in both sales and marketing”, said our client and the company’s General Manager. “We wanted our solution to reflect current methods, effective use of our invested time and financial commitment and we wanted to be able to measure results.”

Over the course of 12 months, SRi provided this client with a Paint-the-Picture® sales playbook and training, leadership coaching, marketing strategy and services, and hiring services. “The best part of working with SRi was exposure to current sales and marketing development methods and ideas – such as CRM selection and implementation, sales playbook, new website development, and new marketing materials and strategies”.

The Sales Results

By working with SRi, the company hired a dedicated sales team and entered a second market in their region. Armed with a prioritized sales and marketing strategy and well-trained staff, our client is confident that they will be able to maintain and expand their plan for growth.

When asked to describe their SRi experience in one phrase, our client said: “SRi did not just design our plan; it was fully implemented as part of the engagement”. At SRi, we are committed to implementation – we work alongside our clients to ensure not only that our custom solutions fit their needs, but that they are fully secure to provide lasting results long after we’ve exited.

