



HIGH PERFORMANCE CASE STUDY

OPTIMIZED MANAGEMENT & TRAINING EXCELLENCE

ABOUT THE CLIENT

A global wealth management company and market leader with strong brand recognition that saw significant variability in performance across key sales roles in the organization. Client had significantly invested in tools and training, but leadership knew they needed more in order to perform at higher levels. Additionally, the Client had acquired another large business, faced significant internal changes, and experienced significant increases in competition and price compression. The Client needed to ensure their go-to-market strategies would create growth at needed pace and appropriate levels of scale. They sought improvements enabling the team to handle a two to three-fold business volume increase.

CHALLENGE

The Client did not have clarity or alignment on the definition of high performance in critical sales roles and lacked consistent and scalable approaches to developing people in these roles. Many in the field sales force lacked the ability to appropriately leverage their sales channel and demonstrate value enough to effectively form strategic relationships with advisors. Some of the sales force lacked required bandwidth or focus to deliver differentiating value propositions, superior products, long-term impact for clients and plan participants, and unmatched industry expertise.

APPROACH

Leveraging our Performance Works Program, SHIFT conducted a study of the sales and distribution organization, revealing key barriers to performance that were adversely impacting individuals, and cross-functional teams' ability to consistently meet and exceed company expectations. Additionally, critical business outcomes, behaviors, and competencies held by top performers could not be effectively leveraged across the sales force. Barriers included misalignment between goals, compensation, and expectations, lack of learning interventions that aligned the production of critical business outcomes, timeliness and effectiveness of training, a lack of standardization in best approaches to the market, tactical instead of strategic operation, and eroding culture and morale.

SOLUTIONS

Based on the study, SHIFT designed and implemented a comprehensive approach to optimize sales and retention effectiveness with multiple change levers being simultaneously pulled. SHIFT's solutions included:

- Strategic counsel with senior leadership to create organizational clarity, alignment, and higher levels of performance at the senior level
- Organizational structure and compensation programs that align with the new strategy
- Onboarding and training practices to help develop and retain top performers
- Implement SHIFT's Precision Coaching model to help sales leaders accelerate and amplify sales performance across the organization
- Sales enablement tools to support higher levels of performance and achievement toward the organization's goals and strategies

IMPACT

- Exceeded company revenue goals by over \$250m in the first year following implementation of Performance Works Program
- Compression in time-to-competency for new hires, and newly formed cross-functional teams
- Highest engagement scores across the organization with more than 86% of employees rating as "engaged" or "highly engaged"
- Sales assets and development efforts that aligned directly to the factors that support high performance in critical sales roles

READY TO ACHIEVE HIGH PERFORMANCE?

*Work one-on-one with a
SHIFT expert to discover
strategies, techniques, and
tools to drive high
performance in your
organization.*

*Schedule a 30-minute
SHIFT exploration session.*

[SCHEDULE NOW](#)