

# CASE STUDY

## \$15+B FINANCIAL SERVICES COMPANY

### Staying sharp and focused on what works:

how Engage Selling helped this financial services company boost their sales with renewed confidence and knowledge of what works.



Boosting the annual sales performance of an organization hinges on many factors, but a common strategy in the winner's circle is the mixing of something new with what already works well. When the SVP Sales of a division within this large U.S.-based financial services company called on Colleen Francis at Engage Selling, it was the first time an outside consultant had been brought in to help with sales coaching. This was a bold move that yielded many benefits.

Doing something new, "Helped give us the confidence to identify what was working well for us and to stay the course." Working with the executive and the sales team, Colleen's custom-made coaching program helped validate key parts of

their existing sales process—in particular, account planning and a persistent focus on client needs.

The value of knowing what works well in sales resides in your ability to capture and share that knowledge within your organization. That's why an important outcome of the first experience working with Colleen was the development of a best practices guide, assembled with the direct input of the executive and the sales team. It has become a valuable resource inside the company and is still in use today, several years after it was first created.

"Working with Colleen reminds us of the basics of what works in sales and why," said the SVP Sales. "Her message is rooted in common sense, but it's backed by field-tested methods that really work, and that's what matters a lot when you're looking to boost sales year over year in a large organization."

Learning more from Colleen about what works best in sales is something that doesn't just begin and end with one coaching session—it's the start of an ongoing process. "All of this is an

opportunity to keep sharpening your saw," the client explained. That's why Colleen returned again for a second coaching session—again with custom-made material for a topic specific to the needs of the organization. The executive and sales team participants remain devoted followers of Colleen's free newsletter and blog, where valuable selling tips are shared regularly. Up-to-date ideas shared regularly help keep a growing organization focused, and for this financial services company, it's an investment that keeps yielding great results—year after year.

**Find out more about how Colleen Francis and Engage Selling Solutions can help your company ignite a nonstop sales boom: visit us online today at:**

**[EngageSelling.com](http://EngageSelling.com)**



**Get Engaged – Get Results!** Contact Engage Selling today:  
[www.EngageSelling.com](http://www.EngageSelling.com) 1-877-EngageU or 1-613-730-7700

---

“Working with Colleen reminds us of the basics of what works in sales and why. Her message is rooted in common sense, but it’s backed by field-tested methods that really work, and that’s what matters a lot when you’re looking to boost sales year over year in a large organization.”

---



## **ABOUT COLLEEN FRANCIS**

Colleen is driven by a passion for sales – and results. A successful sales leader for over 20 years, she understands the challenges of selling in today’s market. Clients who work with Colleen note her frank, no-nonsense approach to solving problems and addressing opportunities. Colleen has become renowned for her practical strategies and use of measurement and accountability to inspire sales team results.

Colleen has been distinguished as a Certified Sales Professional (C.S.P) and an inductee into the Speaking Hall of Fame. Sales and Marketing Magazine has called Colleen and Engage Selling: One of the top 5 most effective sales training organizations in the market today!

**Find out how Colleen's coaching programs can make an immediate and lasting impact to your results.**

Contact us now at [1-877-364-2438](tel:1-877-364-2438) or go to [www.EngageSelling.com](http://www.EngageSelling.com)



**Get Engaged – Get Results!** Contact Engage Selling today:  
[www.EngageSelling.com](http://www.EngageSelling.com) 1-877-EngageU or 1-613-730-7700