

# Financial Services:

Actual client name withheld

## Financial Services Firm Grows Pipeline 3x



### Background

The client, a provider of technology solutions for the financial world, had successfully worked with FranklinCovey's Sales Performance Practice for some time. As a result of the superior performance other business units were achieving with FranklinCovey, its payments team asked for our help.

The payments team sells solutions for processing checks at banks and credit unions. The team wanted to bring more discipline and consistency to their pipeline development, opportunity qualification, and forecast accuracy.

The team's pipeline was weak, with a less than 1X coverage ratio, and the client wanted to grow it to at least 3X. Forecast accuracy was consistently off by 10-15%, and the team wanted to reduce this variation.

### Implementation

The client brought in FranklinCovey's Sales Performance Practice to help field sales leaders and their teams apply consistent sales skills, tools, and processes to their client interactions. FranklinCovey consultants worked with the team to customize a solution that included its *Qualifying Opportunities™* and *Filling Your Pipeline™* programs.

### Solutions:

*Helping Clients Succeed®*

*Qualifying Opportunities™*

*Filling Your Pipeline®*

*Opportunity Coaching*

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FranklinCovey sales coaches conducted post-training leader coaching for opportunity advancement, sales management, pipeline gap coverage, deal health of top pursuits, and targeted account plans for deals over \$500,000.

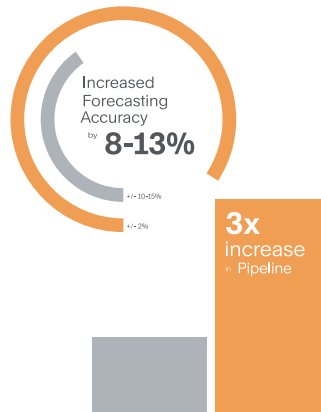
## Results

As a result of this work, the payments team saw improvements in pipeline growth within the first 100 days of coaching. Within ten months, their pipeline had almost tripled, from \$51.6 million to \$147 million. The team was able to improve quarterly forecasting accuracy from +/- 10-15% to +/- 2% over the period of the engagement. Also during the engagement, the client brought on a new sales leader. A FranklinCovey coach was instrumental in helping that leader ramp quickly and execute against previously defined priorities.

At the outset of this engagement, the client needed help to strengthen its pipeline and forecast growth more accurately. With customized, world-class training, focused deal-level coaching, improved discipline around individual business accountability, and the direct involvement of management, the payments team achieved its goal.

## Why It Matters to You

What does your sales organization need to meet or exceed its goals? FranklinCovey can help your



organization achieve sustainable results with its award-winning sales effectiveness programs.

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.

## 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.

## About Helping Clients Succeed®



The FranklinCovey All Access Pass® allows you to expand your reach, achieve your business objectives, and sustainably impact performance with unlimited access to FranklinCovey content. The pass comes complete with tools, assessments, videos, digital learning modules, and all of FranklinCovey's training courses—available Live-Online, On Demand, and Live In-Person.

For more information, contact your FranklinCovey client partner at 888-868-1776.

