

SUCCESS STORY

THE NEXT LEVEL DIFFERENCE

Simply put: it's unwavering execution—Next Level results

The Next Level delivers performance consulting to sales organizations, client service organizations, and call centers. We focus relentlessly on boosting the key metrics that matter most to your business. Example project goals include:

- Increase sales and profitability
- Transition a service organization to a sales organization
- Improve coaching, accountability, and follow up skills of leadership team and sales and service managers
- Transfer best practices to everyone on the team
- Increase business with existing customers
- Improve employee morale and retention
- Improve productivity per salesperson
- Shorten the sales cycle
- Improve conversion rate over phone or face-to-face

Each of these initiatives is achieved through a customized program based around company, industry and cross-industry relevant best practices.

Contact us today to learn how to take your performance to The Next Level.

CLIENT

Banc of America Securities LLC

San Francisco, CA

PROJECT FOCUS

Improving performance of high-end private wealth management team

OVERVIEW

Banc of America Securities is a division of Bank of America. Private Client Advisors are wealth managers for ultra-affluent clients of the bank. This team is experienced, well educated, and uniquely prepared to work with these demanding clients. The Next Level was brought in to help this team in the middle of a very tough economic environment and a market that has posted three straight years of declines, making it difficult for this team to grow through gathering new assets. The goal of this project was to help this team build a strategy to grow their assets and provide the coaching and follow-up to make sure execution happened.

OBJECTIVES

The main objective of the project was to create a business development process that the Private Client Advisors could use to attract more assets from their current client base. The 20 Private Client Advisors conducted an extensive business analysis to understand their book of clients and to assess opportunities that they were not taking advantage of. This analysis gave these Private Client Advisors the ability to get in front of their existing clients and led to a strategy and methodology to meet with these clients to reposition their relationships and gather more assets. The project included four months of follow-up/execution meetings with the Private Client Advisors to assist them with the meetings they scheduled with their clients, to insure accountability and measure results.

RESULTS

Results include:

- Eleven teams participated in the project and conducted a combined total of 170 repositioning meetings with existing clients.
- These 170 meetings uncovered \$6,540, 800,000 of new assets.
- These 170 meetings gathered \$345, 098,867 in new assets.
- The Private Client Advisors now have a system that they can use to further develop their client relationships.
- Best practices were shared throughout the entire sales team.

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