

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

Morgan Stanley - Recruiting

New York, NY

PROJECT FOCUS

To improve the recruiting performance of Morgan Stanley's nation wide network of Branch Managers so that they could attract more successful financial advisors from the competition and win the war for talent

OVERVIEW

Morgan Stanley is one of the largest and most respected financial services firms in the world with a field sales force of over 8,000 Financial Advisors in roughly 300 branch locations. As in any industry, attracting top performers is very competitive especially in financial services. The goal was to help Morgan Stanley Branch Managers to further develop their recruiting skills so that they could attract more top talent in the brokerage industry to Morgan Stanley.

OBJECTIVES

The primary objective of the project was to gather the best practices of fifteen of the top performing recruiters at Morgan Stanley and then transfer those best practices to the other 300 plus Branch managers in the firm. In the calendar year 2006, Morgan Stanley had a good recruiting year but was determined to make 2007 even better. Morgan Stanley wanted to have a greater number of their Branch Managers bringing in recruits as well as more recruits year over year. So we shadowed their top performers in the field, conducted best practices focus groups, created and delivered instructor led training, and followed up to insure execution. We partnered with both Learning and Development and Senior Management to make the project happen.

RESULTS

The project was completed as of October 2007 with the following results:

- There was a 36 % increase in Branch Manager participation in recruiting nation wide
- Branch Managers new to recruiting became good, and good recruiting Branch Managers got even better
- There was a 78% increase in the number of overall recruits year on year
- They eclipsed their recruiting goal for 2007 by 21%

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