

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

UBS Financial Services

Los Angeles, CA

PROJECT FOCUS

Improving the sales performance of experienced Financial Advisors and their wealth management teams by managing more of their clients' existing assets

OVERVIEW

UBS Financial Services is one of the largest and most respected financial service providers with a field sales force of over 6,000 Financial Advisors. The goal of this project is to help experienced Financial Advisors and their wealth management teams build a strategy to grow their assets and provide the coaching and follow-up to make sure execution happens.

OBJECTIVES

The main objective of the project is to create a business development process that the Financial Advisors and their wealth management teams can use to attract more assets from their current client base. Typically, they manage 33% of a client's assets. The goal of the project is to provide the tools and support for them to become the Primary Financial Advisor and manage more of their clients' assets. The Financial Advisors conducted an extensive business analysis to understand their book of clients and assess potential opportunities. This analysis provided the insights for them to develop a strategy and methodology to meet their existing clients, reposition their relationships, and gather more assets. The project included four months of follow-up coaching meetings with the Financial Advisors and their wealth management teams to assist with their client meetings and insure accountability and measure results.

RESULTS

The project was completed in January of 2004 with the following results:

- Fifty teams participated in the project and conducted a combined 282 sales appointments with both prospective and existing clients.
- These 282 meetings uncovered \$1,094,821,960 of new assets.
- These 282 meetings gathered \$137,112,761 in new assets.
- Seventy-one of these meetings were with prospective clients and 67 (or 94%) closed with accounts in excess of \$100,000.
- Twenty-five wealth management proposals were created and delivered to affluent households with more than \$2,000,000 in assets.
- The Financial Advisors and their teams now have a system they can use to further develop their client relationships.
- Best practices were shared in the three branches that participated.

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