



Sales Performance **Optimized.**

Client Profile:

Leading North American insurer offering a broad portfolio of financial and benefit plan solutions serving the financial security needs of more than 12 million people with more than \$199 billion in assets under administration.

The Opportunity:

Client identified opportunity to offer formalized sales training and development to improve sales performance and drive customer satisfaction.

Optimé Solution:

Formalized Sales Training & Development Program

The Approach:

- Diagnostic of current sales capability and effectiveness
- Design and delivery of multi-year Distribution capability & effectiveness building program for Customer Relationship Managers, Account Executives and Education Consultants
- Included coaching & leadership development for Regional Sales and Service Directors to sustain and reinforce learning

Training Results:

- Strong participant engagement and alignment (90+% Top 2 Box Scores)

Business Impact

Contributed to:

- Leading industry in total new business acquisition 2006
- Setting a new industry standard for the most new sales ever sold in a one year period in 2007
- Setting all time record for new business cash flow sold in 2008, amidst an unheralded downturn in the economy, as well as significant market turbulence
- Exceeding in-force growth targets each year
- Improving winning ratio in large case finalist presentations