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LEADING VALUE INVESTMENT ADVISORY FIRM GAINS THE FULL IMPACT OF
MAXIMUM IMPACT PARTNERS

Boutique Firm Found a Competitive Edge

When a leading U.S. value investment advisory firm managing over \$35 billion in assets was looking to grow, their managing director and national marketing and client service manager knew it would be a tough road without a properly trained and aligned sales team. That's when they set out to find solutions to the challenges that plague nearly every sales organization at one time or another: Skills, focus, consistency and efficiency. Their leader knew there was one company that could solve each problem and help him advance his sales organization, develop efficient sales processes and align his team with the company and its goals. That company was Maximum Impact Partners.

"Maximum Impact Partners came with built-in credibility," said this company's sales leader. "Both Ami and John had years of real-world experience and had worked through the issues we were facing countless times." They helped us define our issues, assess the best path to solving them, design the training we needed and help us execute effectively." That's the Path to Total Alignment™, and for this company the path came in the form of several key initiatives.

"First, Maximum Impact Partners implemented and delivered a sales skills training program for our mutual fund group. Our internal reps and our wholesalers gained new perspectives and new methods they could use immediately to improve their prospecting, their close ratios and everything in between."

"We also benefited through new-business segmentation strategies. Before we began working with Maximum Impact Partners, we were trying to do too much—we were casting too wide a net and our effectiveness was limited. Maximum Impact Partners helped us segment our current customers, which were a hotbed of opportunity, and focus on the segments with the most potential. The results were dramatic."

But in truth it took more than sales improvements to move this company toward alignment. It took communications, too. Just as Maximum Impact Partners armed the sales force with skills and focus, they also armed them with the right marketing materials with the right message. And best of all, according to the company's sales leader, "Because Maximum Impact Partners' principals and associates have been such a part of this industry, they completely understood it. There was no learning curve and the materials resonated."

Not that this company wants to give their competition advice for success. But they advise others in the financial services industry to let Maximum Impact Partners organize your sales staffs. Let them help you develop your marketing materials. Let them help you get your marketing and sales on the same page. Let them focus your business and direct you to the best opportunities. In short, let Maximum Impact Partners help and you'll be better off for it.

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