

## BRINGING FOUR SALES ORGANIZATIONS TOGETHER

### *One Financial Services Company Sees “Full Impact” of Maximum Impact Partners*

If running a sales organization under normal circumstances isn't challenging enough, imagine running a sales organization that is actually four sales organizations all being brought together as one. That was the challenge that one senior vice president and director of national sales for a multi-fund investment advisory firm was facing, and he had no choice but to make it happen while maintaining quarter over quarter sales growth. It was a tall order and he knew he couldn't do it alone. After all integrating systems is one thing, but melding cultures, philosophies and ways of doing business in a company with over 300 products were quite another. He put the project up for bid.

“A few companies submitted proposals and Maximum Impact Partners was one of them. Right off the bat, the thing that set them apart is that their proposal, and ultimately their work, was completely custom. Totally focused on our needs. Completely developed for us, not for the client they helped last month or last year. I couldn't say that for any other company,” said this company official.

And that's how The Path to Total Alignment works. There are no canned programs or presentations. Each experience is unique. And for this company, the path to define the issues, assess possible solutions, design the training and execute effectively was one of a kind.

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“Among the many important initiatives was working toward a common sales philosophy that would help us approach the market as one sales and service organization. It wasn't easy, but the biggest leaps came from unifying the sales process. Maximum Impact Partners helped us discover the best process for us using their years of real-world experience and years of helping other organizations.” Of course Maximum Impact Partners also focused on sales skills because there were people within the organization at all levels of experience. But process had to come first.

And the result is that this financial services company has a sales process that dovetails perfectly with its service model. “We now know how to maximize our current advisor customer base and keep them delighted. It's not always about finding new business in the form of new advisors.

The company also says Maximum Impact Partners helped their newly formed sales force handle each market more effectively. “Not all markets are as far along as others. Newer markets need more handholding, and we learned to identify the needs and deliver on them.”

“In short, we chose Maximum Impact Partners not only because they clearly knew what they were doing, but because we sensed they were passionate about what they were doing. It showed when we met for the first time, it came through loud and clear in their proposal and proved true through their dedication and work. What did I like most? They have vision, they don't tell you what you want to hear and they deliver results.”