

... **Business Impact**

- Improved speed to readiness**
- Better understanding of sales culture**
- Improved curriculum scores**

# CASE STUDY

## Understanding Customer-Centered Sales Culture at a Large Bank Holding Company

### Situation

A leader in the financial services industry wanted to create a learning solution that would provide employees with a foundational understanding of the retail sales culture. This solution needed to provide retail learners with a strong base from which to grow their skills and focus on their customers.

- ... Providing **learners** with a deeper understanding of **sales culture** through video.

### The Challenge

Senior leaders had a desire to keep the training at a high level so that it could be applied to multiple lines of business (LOBs). To stress the importance of this topic, senior leadership from each LOB needed to be included in the solution. Senior leadership also wanted to show learners that sales learning builds within retail. The journey of learning needed to show learners the progression of their skill enhancements over time and provide them with an understanding of how they will continue to grow their abilities.

While an overarching learning solution for new hires does not currently exist, a similar solution had been created in the past but was not impactful or eye catching. The current retail sales culture learning did not resonate with the employees.

## GP Strategies Solution

The organization partnered with GP Strategies to create a solution that included a video, featuring many of the organization's leaders. The video stressed the importance of the learning components and the company's dedication to improving bankers' skills.

The following key concepts were included in the training to support the performance objectives:

- Customer-focused sales
- Conversations with customers vs. product push
- Appropriate vs. inappropriate sales behaviors
- Customer buying steps
- Sales learning journey for bankers

GP Strategies used an eye-catching and fun concept with splashes of color to engage the retail employees. GP Strategies tailored the video specifically to retail by showing how selling can be attractive and not a linear line of business—there is growth and excitement. The team used an agile project approach to work collaboratively and come to a solution on designs and concepts. Both teams considered the retail sales audience when designing the video; the retail team is massive so the design had to appeal to many groups of employees. GP Strategies decided the best program for creating the video was Adobe After Effects because filters could be applied easily on stock footage, and source materials could be transferred to the client for future updates and edits.

## Business Impact

The video served as an introduction to the foundation for additional learning focused on customers' understanding of benefits and value, and on consultative selling skills. This video set the stage for improved application of skills throughout a learner's sales skill journey, improving on speed to readiness. After viewing this video, learners moved on to more in-depth curriculum based on their individual job roles. Following deployment of this video, retail employees gained a better understanding of the sales culture and had less inquiries around expectations, and curriculum scores have improved. The agile development cycle that the team used for this video has been replicated in subsequent projects between GP Strategies and the organization. This iterative design approach allowed the team to collaborate more frequently rather than only at major milestones and aligned to key concepts more quickly, lessening the project timeline to meet an aggressive deadline.

The video provided learners with a deeper understanding of the organization's sales culture earlier in the onboarding process, which has resulted in improved speed to readiness and earlier adoption of critical sales skills. If the culture is explained up front rather than having to be learned, the employees are more responsive.

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## About GP Strategies

GP Strategies is a leading workforce transformation partner—one of the few truly dedicated global providers in the marketplace providing custom solutions. We believe our transformation focus, when paired with deep listening, a customer-centric approach, and innovative expertise, enables our clients to routinely achieve superior business and operational results from our evidence-driven and technology agnostic recommendations.

Whether your business success requires a change in employee performance and mindsets, learning technologies, or critical processes, GP Strategies is the transformation partner you can trust.

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