

# FINANCIAL SERVICES COMPANY

(ASSETS: \$150+ BILLION)

## Objective

During a period of rapid acquisition-driven expansion, the company realized that additional growth must come from: 1) boosting the conversion rate with retailers calling about establishing a credit card processing account, and 2) increasing retention within the existing customer base. Managers had little or no experience equipping reps with the sales and customer service skills needed to reach the organizational objectives.

## Deliverables

- » Managers, team leaders and supervisors were certified to reinforce the skill development programs while improving their own coaching, management and leadership skills.
- » Sales Reps were trained in the skills, knowledge, and methodology required to successfully sell in an outbound and inbound selling environment.
- » Two staff trainers were certified to deliver the rep training, reinforce the skills learned and measure the results.
- » Managers, team leaders and supervisors attended a Hiring Training program to better recruit, identify and hire qualified candidates.
- » Performance management systems were put in place to maintain the highest level of productivity possible.

## Results

In five months, overall call center productivity rose 32%. Individual reps experienced an increase in productivity as high as 75%.

YOU GUYS  
ARE AWESOME  
THANKS SO MUCH  
FOR MAKING US  
32% MORE  
SUCCESSFUL

Beth Rose-Kearns,  
VP, Training