



PLAN • PROCESS • EXECUTE • RESULTS

COMPANY: Fortune 25 Financial Services Firm

ISSUE: Local office was not completing proper account planning. To the extent planning was done the plans were not being implemented in a timely manner. As a result, production results were below expectation, as were customer service levels (due to lack of timely follow up and poor listening skills).

ROLE: Engagement Director

HIGHLIGHTS

- Reviewed all employee-generated account plans and provided best practices feedback to local Vice President
- Delivered communications skills and plan implementation workshop for all office employees.
- Delivered Enablers and Barriers workshop to office leadership team. Result was affirmation of Company and Office Enablers and prioritized list of Barriers for resolution.
- Facilitated several office leadership team meetings, focused on office productivity and client relationship improvements.
- Provided Vice President with alternative team structures, based on criteria of maximizing client returns (given their risk profile)
- Providing executive coaching, as requested

RESULTS

- Improved focus on client/team member communications, to insure commitments were met
- Ambassador Group focused their office improvement efforts on those generating the highest ROI
- Vice President made decision on optimal team structure for business development