

Case Study

Overview

The organization profiled in this Case Study is a leader in offering businesses, individuals, and institutional clients a wide range of financial products and services. A member of the Fortune 500, this company has approximately \$200 billion in assets under management and serves some 15 million customers worldwide.

This document features one of the company's 30 regional business centers, offering retirement and financial ideas, concepts and solutions to small and medium-sized businesses, executives, and entire management infrastructure.

Objectives

- Increase production, annually, by 20%
- Retain 100% of small to medium-sized (SMB) producers
- Achieve persistency goal of 98% for business written
- Implement a sales process compatible with the company's core values

Integrity Selling

Solutions Implementation

This organization has endorsed the Integrity Selling® program for 17 years. The process begins with each producer attending a week-long school as part of their development. During the school, they complete the Integrity Selling initial seminar. Each producer is then enrolled in the Integrity Selling follow-up process where repetition and reinforcement create strong client-focused attitudes, habits, skills, and behaviors. Continual coaching, participation, and endorsement by management and selected staff ensure the concepts of Integrity Selling remain an active part of their culture.

"Despite the evolution and development of strategic initiatives, Integrity Selling continues to be the overriding philosophy of how we do business."

Regional Managing Director

Impact

- Received prestigious General Agency Managers Association (GAMA) Master Agency classification
- Established a 40% region retention rate for past 10 years; industry standard is 11%
- Achieved 96-98% consistently in meeting persistency goal for business written
- Created a professional atmosphere with higher level of respect between staff and producers

GAMA
MASTER AGENCY
CLASSIFICATION

40% REGION
RETENTION RATE

MEETING
PERSISTENCY
GOAL

PROFESSIONAL
ATMOSPHERE

"The Integrity Selling process is the cornerstone of our sales philosophy. We believe that it's important to have a proven, structured sales process to guide both new and experienced representatives. We've used Integrity Selling for several years and the results have been extremely positive."

Managing Director, Midwest Region, Leading Fortune 500 Financial Services Company

"Over 16 years ago we introduced Integrity Selling as the only selling system to be supported in our Agency. In 33 years of management, I have never had any selling system deliver results as dramatic or as sustained as the Integrity Selling system. What has made it unique is that it has been extremely effective with brand new producers and with experienced veterans while spanning a time of tremendous change in our industry."

Regional Managing Director, Midwest Region, Leading Fortune 500 Financial Services Company