

# 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.

IMPROVE  
PLANNING

INCREASE  
PRODUCER  
GOALS

FASTER  
BUSINESS  
MARKET  
ENTRY

20%  
GROWTH

## Objectives

- Improve development of producer business and personal plans
- Increase producer goals set at beginning of year, leading to higher production
- Create faster and more systematic entry into the business market
- Achieve 20% growth in production

## Solutions Implementation

Since 1996, Managing Goal Achievement® (MGA™) has been a part of the success strategy for this Business Center. Managing Goal Achievement is introduced to producers on the last day of *Top Gun School* and then reinforced through the nine-week follow-up process. Managers follow an intense coaching schedule to reinforce the goal achievement principles and keep the process alive. To ensure the momentum continues, the advanced MGA Personal Growth Sessions are incorporated each year as a part of the strategic planning process.

## Impact

- Won unprecedented (5 out of past 10 years) Top Business Center in the Company
- Received Regional Managing Director of the Year Award 5 out of past 10 years
- All 4 Managing Directors were in 'top 5' company-wide in 2005
- Increased Club Qualifiers (49% of producers qualified in 2005)

*"The Managing Goal Achievement® (MGA™) program has played an integral role in the success of our organization. Our top producers are actively incorporating MGA goal setting techniques in their business plans. Our management team utilizes MGA and the MGA coaching and counseling sessions to help our producers continue their personal and professional development."*

**Managing Director, Leading Fortune 500 Financial Services Company**

*"Like many Business Center leaders, I have struggled over the years trying to find a viable and effective Goal Setting and Goal Monitoring program for our managers and our producers. Our search ended when we began using Managing Goal Achievement® ten years ago. It is one of the most dynamic and rewarding experiences we have taken our people through. Over the years their growth and development, both personally and professionally, as a result of this program, has been phenomenal."*

**Regional Managing Director, Leading Fortune 500 Financial Services Company**