

# Transforming Internal Sales Teams Into a Value-Driven, Customer-Focused Culture

## Overview

To accelerate growth to meet increased targets and enhance its competitive positioning, **a leading retirement services and insurance company** that issues, reinsures and acquires retirement products through a number of distribution channels recognized that it would have to build a more value-driven, customer-focused sales culture.



## OBJECTIVES

With the company fighting for mindshare against other insurance carriers competing for the attention of their agent/advisor customers, leadership determined that it needed to enhance the ability of their Internal Sales Teams to engage agents/advisors and create differentiating value. This would require:

- Developing a deeper understanding of customer wants and needs
- Shifting from a product focus to a value-driven, business-focused conversation model
- Applying a consistent sales process, rooted in values and ethics
- Building a strong reputation as a sales team

## SOLUTIONS

The company engaged with Integrity Solutions to help their Internal Sales Teams pivot from serving as order takers to working as true consultants to their agents and advisors. The initial implementation encompassed a three-year rollout of the Integrity Selling® program that included an emphasis on learning how to:

- Ask more thoughtful and compelling questions
- Uncover differentiating value from the customer's standpoint
- Shift their mindsets about their role
- Develop team members to be ready for their next role

*“Integrity Selling®’s focus on trust and honesty helped me become an Advisor’s ‘annuity guru’ and generated \$1.2 million in new business.”*

— Internal Wholesaler

*“I believe that a company should provide their employees with all the necessary tools to help them be successful. With Integrity Selling®, we are giving them a tool to help them make a huge impact with the agents and advisors they serve. We see first hand how interactions with our agents and advisors drastically improve as our team members put into practice the processes they learned through Integrity Selling®.”*

— Vice President, Internal Sales

*“By following the AID,Inc.® sales process, I was able to gain the Agent's trust and an additional \$1.5 million in business.”*

— Internal Wholesaler

The Integrity Selling® training includes a series of sessions focused on application and accountability to ensure ongoing impact and results. For further sustainability, the company launched Integrity Coaching® with internal sales managers and Integrity Selling® Refresh™ an interactive online reinforcement platform designed to reinforce and extend the training's concepts.

*“Integrity Selling® helps us think differently about our customer experience. The simple to use platform not only delivers impactful sales training and development – it promotes team member collaboration. At our company, we help people retire better...Integrity Solutions is a key partner in making this happen.”*

— Internal Sales Manager

## Impact

Since the beginning of the implementation, **the Internal Sales Team has more than doubled in size.**

The **Integrity approach has become a cultural touchstone**, integral to the way the sales team does business.

Significant internal Sales Team growth, with **total sales increasing 47%** since the relationship with Integrity Solutions began.



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