

Extracting Value from Sales Management Forums

Blackdot helps a leading investment bank design and implement a new set of forums to enhance sales performance



CHALLENGE

The Futures team of an Australian investment bank sought a quantum shift in sales performance across their team of traders located across the globe. However, the traders' role required them to be highly responsive to customer requests – severely limiting their time for proactive selling and regular team meetings.



SOLUTION

Blackdot's team of consultants conducted a series of structured interviews and observations to identify the sales disciplines and behaviours of the company's frontline salespeople and managers. Working carefully within the confines of 'what's possible and practical', our team then helped facilitate an iterative design process to build and implement a set of carefully-defined sales forums. These included regular global and regional sales meetings, and 1:1 coaching for each trader.



RESULTS

- More proactive and strategic selection of target accounts
- Regular sales pipeline maintenance and more effective management of opportunities
- Effective coordination of multi-point sales efforts across global accounts
- Regular review of sales performance at global, regional and individual trader levels, enabling effective 'course-correction' and refocusing around sales targets
- A fundamental improvement in overall sales performance, with a 33% uplift in YoY revenues