



# Case Study: Coaching Technology

## Background

**Bank X is a market-leading, customer-focused, full service bank with a long history of superior performance and community involvement.**

**Objectives:** Bank X needed a solution to help them create a robust coaching program to meet goals to better serve their customers.

**Solution:** Bank X decided to implement a Sales Leadership Platform solution from Xvoyant. The solution was deployed in the bank's Salesforce™ instance and rolled-out to bankers over a 120-day period.

## Team Change

One team, in particular, has had outstanding success with Xvoyant, creating a robust coaching culture. The team from Central Idaho has employed the tool to set and track individual goals, establish a coaching cadence, and create a culture of intentional improvement.

In just six months of using Xvoyant:

- Progress to goal moves from 40% to 145%.
- Process to Requirement moves from 57% to 160%

- 9 of 9 reps in the “Predictive” Performance Quadrants. This predicts that more sales success is yet to come.
- 100% of reps show positive coach-ability. This predicts ongoing success.
- Quota Attainment moves from 33% to 67%—doubling in just six months.

These numbers indicate that the team has shown significant change, including:

- Improvement in process
- Improving outcomes
- Number of opportunities increasing

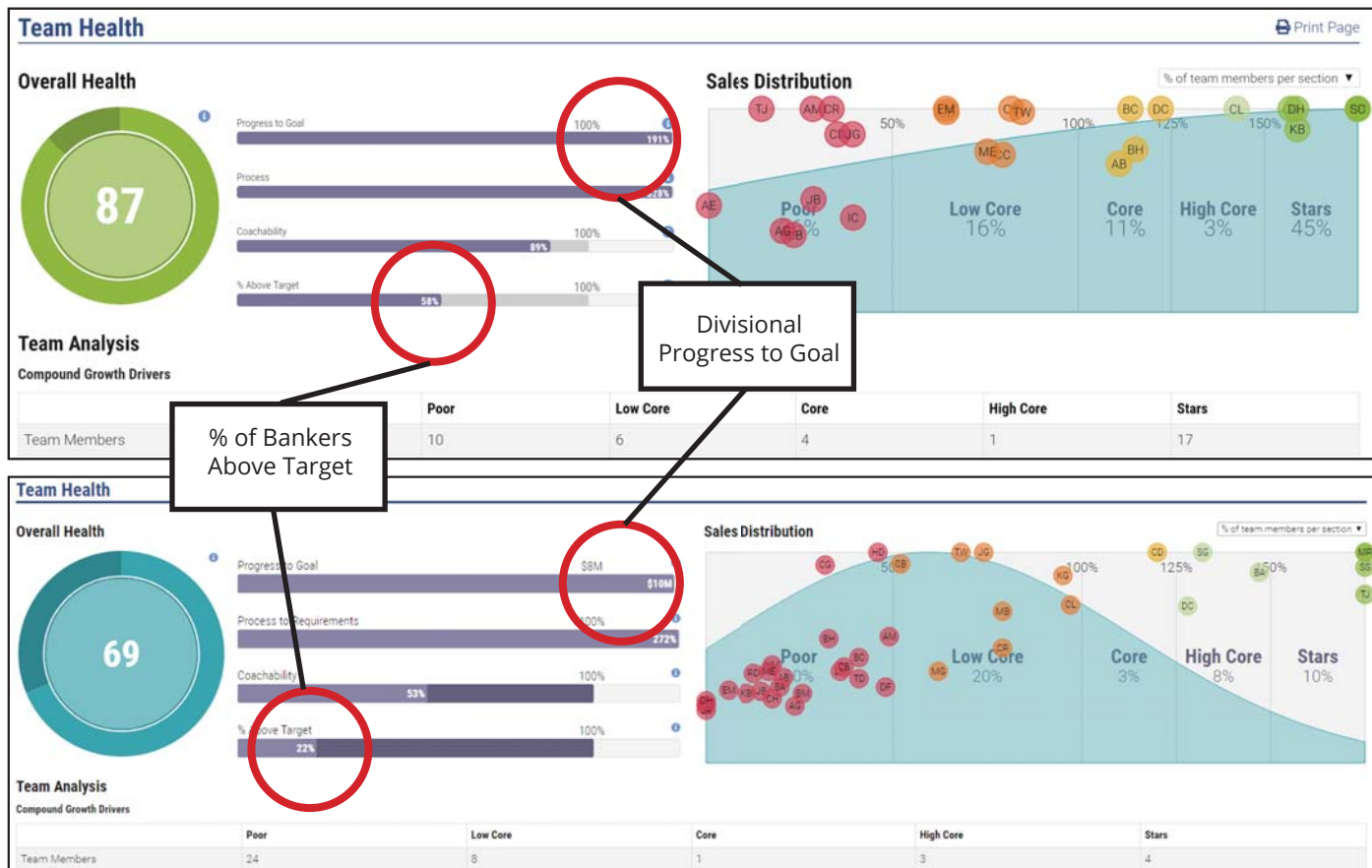
The Bankers' efforts to be coach-able have paid off in engagement and retention as well.

## Divisional Wins

Treasury Services is one of the most strategic sales teams for Bank X. The team had a very successful 2017 and beat their sales goal by 20%. While they hit the division goal in 2017, they did it on only 22% quota attainment from the sales team. They hit their goal based on the efforts of a few rainmakers.

Bank X leadership recognized the need to get more of a return from the other 78% of the team who were not reaching goal, and based





the 2018 goal on achieving 50% quota attainment from 80% of the team. They adopted a segment-driven coaching strategy where each rep made goals on how to move from Poor to Core, Low Core to High Core, and so on.

After just 120 days the results are impressive:

- 22% attainment to 58% attainment
- 20% above goal to 91% above goal
- 328% more in process
- Coachability metric is 89%.

These results were accomplished without additional training for any Banker, only empowering the front-line managers.

## Corporate Transformation

Bank-wide, sales teams have seen similar results. In just six months of using Xvoyant:

- Salesforce™ usage up 95%.
- Production: up 11% bank-wide

- Process: 243% above target
- 80% achieving monthly coaching goals
- % to Goal: up 12% bank-wide!

*"I can tell you this for a fact: with the Xvoyant process in place, those bankers who have adopted it and really adhered to the principles—their production is up 30 to 40% in a 3-month period of time."*

*"I strongly urge you to contact Xvoyant to drive these kinds of results in your own organizations."*

—President, Bank X

