



# Sales Solutions for Finance: Unlock your sales team's highest potential

Sales Solutions helps financial services companies achieve revenue growth by maximizing their salesforce effectiveness – increasing customer conversions, reaching the right clients, taking advantage of cross-selling opportunities, and optimizing coverage.

## Sales Solutions helps financial institutions drive revenue growth by empowering the front line with skills and tools to increase sales efficiency.

Increasingly, the top sales leaders are using data, rather than intuition, to make strategic decisions about coverage, talent, and forecasting.

However, it's difficult for a company to objectively assess its team's capabilities, analyze the productivity of its Relationship Managers, and identify areas where they are falling behind. As a result, sales managers end up taking a manual approach to assigning RMs, and are often unable to focus on the right capabilities.

Sales Solutions solves this problem. We help sales leaders in financial services companies optimize their team's efficiency and productivity across three areas:

### Organizational capabilities

Benchmark the capabilities of front line sales and identify individual performance gaps to drive change management programs and hire top talent.

### Data-driven coverage strategy

Assess the time allocation, call planning, and productivity distribution of a sales team to automatically assign the right sales people to the right accounts.

### Value-driven account management

Compare the current and potential value for each account, identify value creation opportunities across the entire relationship (e.g. cross- and up-selling, risk mitigation), and structure account plans in coordination with product specialists.

## Why Sales Solutions?

### Extensive benchmarking

Our proprietary benchmarking database consists of data from 200+ corporate sales organizations. Our metrics cover sales capabilities across 170+ practices and outcomes, allowing companies to compare the most essential key performance indicators to peers.

### Industry expertise

McKinsey's global team of sales experts constantly qualify our methodology and validate each best practice we advocate. We leverage the firm's extensive expertise in operational benchmarking, sales operations and planning, and organizational transformation to ensure our insights are accurate and effective.

### KPI monitoring

Our tools allows executives to track the effectiveness of their planning, capability-building, and account management efforts in real-time to maintain alignment between sales initiatives and an organization's overall strategy.

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## Sales Solutions for Finance by the numbers:

# 10-15%

Revenue improvement

# 20

Terabytes of proprietary data

# 200+

Sales organizations in our benchmarking database

### Get started

To learn more about our Sales Solutions for Finance, contact us at [contact@periscope-solutions.com](mailto:contact@periscope-solutions.com) or visit [www.mckinsey.com/periscope](http://www.mckinsey.com/periscope)