

# Accelerating growth to hit escalating sales targets

**ABOUT INVESTEC:**

Investec are an international bank and wealth manager that partner with their clients. They have 8,500 employees across its core geographies of the UK and South Africa, along with other locations across the globe.

**COMPANY SIZE:**

5,001-10,000 employees

**INDUSTRY:**

Financial Services

**SBR SERVICES:**

Sales performance, sales training, negotiation skills

Consistently Outstanding Performance

Consistent Achievement of Sales Targets

Efficient Onboarding

Internalised Methodology

Enhanced Collaboration

## What did Investec want to achieve?

Investec's primary objective was to achieve accelerated growth to hit escalating sales targets. Additionally, they aimed to streamline and enhance their onboarding process, seeking greater efficiency. Investec desired a comprehensive strategy that would enable them to exercise better control over client interactions, promoting a more cohesive and unified approach across all touchpoints.

## What issues were Investec facing?

Investec were grappling with challenges stemming from their growth objectives, necessitating a significant improvement in sales performance. A lack of cohesion was evident in the diverse sales approaches adopted by different entities under Investec. The teams exhibited a range of skill sets and experiences, each characterised by unique nuances. The client base displayed considerable diversity as well. Furthermore, the absence of a standardised benchmark for effective client interaction further compounded the issues. These cumulative factors were impeding swift onboarding and proficiency attainment for team members.

## The results

- Consistently Outstanding Performance:** The team we collaborated with has consistently outperformed all other teams within Investec, establishing itself as the top-performing unit.
- Consistent Achievement of Sales Targets:** The team has consistently met and exceeded their expanding sales targets, showcasing a robust sales performance.
- Efficient Onboarding:** Utilising the insights gained, the team has successfully streamlined their onboarding process for new staff, significantly reducing the time required to bring them up to speed.
- Internalised Methodology:** The team has fully embraced the methodology introduced, autonomously advancing and enhancing their performance over the course of the year. Regular team real play sessions and training workshops, led by the team leader, have been instrumental in sustaining and deepening the learning.
- Enhanced Collaboration:** The collaboration between the team and the origination team has notably improved. The origination team, responsible for lead generation and initial qualification, has seamlessly integrated with the FX sales experts, leading to a more harmonised approach.

## SBR's approach

SBR took a strategic approach that led to significant success. The training was expertly guided by a seasoned sales practitioner deeply versed in banking and finance, ensuring seamless communication with the team and a relatable application of content through real-world scenarios. Our consult-create-embed framework proved instrumental in comprehending the team's unique context. Through in-depth analysis of sales calls, client email interactions, and review of recent deal outcomes, we meticulously crafted a customised programme. This programme catered to teams of varying seniority levels, fostering growth not only in negotiation skills but also in overall confidence. This comprehensive strategy resulted in impactful results for Investec.



"We wanted to accelerate sales performance to hit our targets and streamline our onboarding process. SBR's background in banking and finance led to the team they worked with outperformed all other teams within Investec, establishing itself as the top-performing unit. We developed an internalised methodology and significantly reducing the time required to bring new starters up to speed."

Ria Selvaratnam

Head of FX Sales