

# ...Saltus

FINANCIAL PLANNING AND INVESTMENT MANAGEMENT

## Doubling a wealth management advisory's organic growth through sales transformation

### ABOUT SALTUS:

Saltus is an independently owned financial planning and investment management company. They offer a complete solution to private clients and act as a trusted partner to a growing number of professional connections.

### COMPANY SIZE:

51-200 employees

### INDUSTRY:

Investment management

### SBR SERVICES:

Sales enablement, sales transformation, sales performance, revenue growth strategy, sales training, sales leadership, sales coaching

### What issue were Saltus having?

Saltus wanted to improve their organic growth. To achieve that growth, they needed change and support with their top-tier management. Saltus allocated budget to outsource a consultancy partner. They were looking for someone who could work with both the sales & leadership teams to bridge the gap between them. Saltus wanted to take their time in their search to create a long-term partnership – they wanted someone who would not only train but consult and find any other issues as well.

### The return on investment

Before Saltus engaged with SBR, they had about 6-7% growth organically YoY and set what felt like quite an ambitious target to grow at 10%. After working with SBR, Saltus are running at just above 12%.

They had one advisor who brought in more than £10 million of assets to the business. Now Saltus have 80% of the team on course to deliver that. There was a noticeable difference and value add through sales transformation & enablement. Systematically, SBR helped build a repeatable structure with a train-the-trainer approach. Some example implementations Saltus now adopt are monthly 1-2-1s with their advisors, monthly shadowing calls and roleplay sessions. The advisors share their best practices to build a culture of continuous improvement.

### From strategy to execution...

SBR started with the consult phase which was an audit on Saltus' current sales capability, including strategy, structure, process, and methodology. SBR benchmarked their current sales competencies and exhibited them against industry and market best practice. Creation of the outputs and deliverables of the consult phase determined the scope of the create phase and was outlined in a revenue acceleration report. SBR engaged with Saltus' team to roll out and support the implementation of the new processes, frameworks and tools.

**From 6% to 12% growth...**

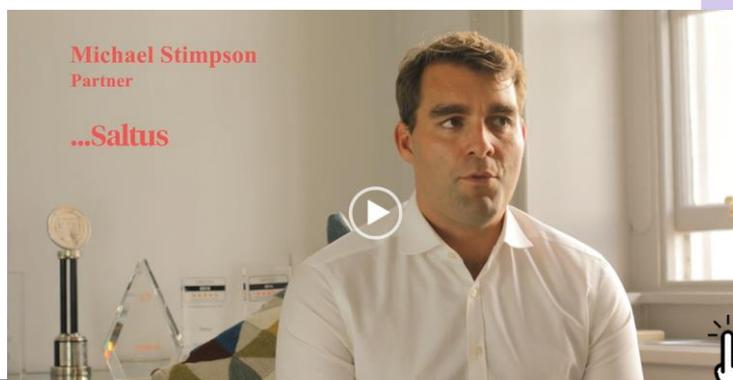
...after setting a target of 10%!

**£10 million**

**80% of the team now bringing in more £10million of assets to the business**

### Continuous improvement

Saltus say they now have a culture of continuous improvement



It's been a big change for us and helped create a culture of continuous improvement. The advisors are now coming to us and asking if we have time for more roleplay sessions!"

**Michael Stimpson**  
Partner



Saltus are all hugely indebted to SBR for the internal revolution which has occurred on the sales front. It's also showing progress on the management front. The service provided is absolutely excellent, both in form and content."

**Jon Macintosh**  
CEO

