

From product-focused to client-focused...



Client need

One of the largest Mexican financial institutions wanted to **improve its sales through building stronger relationships with clients**. This meant shifting from a product-focused to a customer-focused mindset. To do so, the company recognized the need to **increase its focus on Net Promoter Score (NPS), cross-selling, and market penetration**. Bankers needed to be able to manage and prioritize their pipeline of current and new clients, and bring value to every interaction.



The solution...

The bank partnered with BTS to co-create a **two-day program** addressing their Sales Representatives, and a three-day solution for their Directors. Both programs focused on **improving proactivity** in prospecting, **generating sales cadence**, and moving towards a more **client-centric mindset**.

- During the workshop, the salespeople experienced a simulation that had them manage five different clients and their pipeline, which helped them align their actions to what clients needed at different moments.
- After the workshop, participants completed a series of follow-up activities to practice prospecting, improving client interactions and closing sales.



Results

29%

increase in prospects for bankers who attended the program, compared to those who did not attend

30%

increase in closed opportunities for bankers who attended the program versus those who did not attend