

Optimising Consultative Sales across Intermediated Distribution

For Deeper, Broader Retirement Conversations



CHALLENGE

Just were looking to give their Intermediated Distribution teams the confidence and capability to have broader and deeper retirement conversations to better position the entire Just proposition.

Looking to grow in traditional areas whilst also diversifying and expanding into new markets, Just aimed to grow their customer base and offer a broader range of solutions. To do this, all sales teams, from the most senior Key Account Directors to the newest telephone team members, needed to embrace a more consultative approach. They needed to have more holistic conversations with advisers around customers' broader needs and the different options Just offers.

SOLUTION

Just invited Bigrock to design and deliver a bespoke development programme to embed a mindset, process and skillset for consultative sales. Bigrock designed a two-stream programme to meet the different needs of the different roles in scope.

In stream A we designed and delivered 3 x 1-day modules that explored how senior Key Account Managers could use consultative techniques to build more holistic relationships with Just's most important accounts. These modules looked at how to use consultative techniques when face-to-face with advisory firms. We also introduced strategic models for prioritising key accounts and building more strategic relationships.

In stream B we designed and delivered 2 x 1-day modules that explored how similar consultative techniques could be utilised in telephony conversations with smaller advisory firms and IFAs to gain a deeper understanding of their customers' requirements and have more holistic conversations.

In addition to their modular workshops, attendees in both streams were given access to accompanying digital learning in our Key Account Management, Consultative Sales and Telephony Sales digital learning rooms.

RESULTS

The Sales Excellence programme gave Just's intermediated distribution teams a consistent consultative approach, tailored for use in both face to face and telephony environments.

Coupled with the in-house technical training that was provided, the Sales Excellence programme has achieved a lasting legacy of change across the organisation. The impact has been described by senior leaders as "transformational", and Just have quickly seen improvements in the confidence and capability across their sales population.

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JUST.

Just fully embraced the training, adding banners, posters and mouse-mats with key reminders across their office to aid application and embedding.



Matt Pheasey, who commissioned the programme, said:

"I had high expectations when I commissioned Bigrock to run this programme, having worked with them before. I could not have been more impressed, right from the early stages of the project where all of the Bigrock team ensured they really got to know us, understanding the culture of the company and our requirements. Through to the delivery of an effective and highly impactful series of workshops. The 2 Bigrock Consultants were a great combination, providing valuable insights to proceedings. I wanted this programme to build the confidence and capability of the sales teams, and that is exactly what has been achieved."

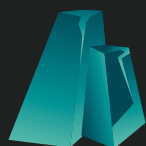
FEEDBACK

"Very engaging and interactive... the facilitators were knowledgeable and supportive." - Sales Development Consultant

"Well delivered, professional, concise messages about what we 'actually' face on a daily basis." - Sales Development Consultant

"Great course, lovely trainers and has given me some good ideas to start practicing with my accounts." - Key Account Director

"Keeps you engaged, interactive and actually fun. Very memorable." - Telephone Account Manager



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