

Financial Industries

Sales Performance Excellence

Sales Performance Excellence in Financial Industries

“Identify success factors – Enhance sales performance”

Sustainable, earnings-based growth requires that all levers in sales are set properly. This finding is the basic tenet of Sales Performance Excellence in Financial Industries – a holistic approach to the structured design and performance management of sales by financial service providers.

Based on extensive project experience as well as practical and scientific findings, Horváth & Partners has developed the Sales Performance Excellence Framework. It comprises the eight key design areas of sales performance, which are each affected by four dimensions.

These four dimensions of Sales Performance can be characterised by the following key issues for the optimization of sales:

- **Strategy and innovation:** How can you ensure your sales activities are continuously aligned with a sustainable and forward-looking corporate strategy?
- **Process, organization and IT:** How can you design your sales processes and create the organizational foundation for the continuous improvement of performance and integrated IT support?
- **Steering and controlling:** How can you establish sales-based performance measurement and thus lay the foundations for determining performance levels and continuous performance management?
- **Human capital:** As the medium of sales performance, how can your sales personnel be motivated, enabled, fostered and remunerated?

Strategy and Innovation	Process, Organization and IT	Steering and Controlling	Human Capital
Customer Management			
Advisory, Sales and Customer Care			
Products and Pricing			
Sales Channels			
Compensation and Benefits			
Leadership and Culture			
Recruiting and Talent Management			
Brand and Communication			

The Sales Performance Excellence Framework of Horváth & Partners for Financial Industries

To increase the sales-related performance continuously – that marks Sales Performance Excellence. It is not about a certain condition, but rather the ability to manage all significant sales success factors: the distribution is always determined by the corporate strategy and should be designed, managed and continuously optimised.

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Constantly new insights from practice – all trends at a glance

We continuously identify and analyze current and future success factors for sustainable, earnings-based growth in sales as part of our Sales Performance Excellence in Financial Industries network. Short surveys regarding current topics of the financial sector are primarily addressed to executives in the sales area on an executive board or director level.

Become part of this exclusive network!

We would like to invite you to participate in our short surveys and become a member of the Sales Performance Excellence network – an exclusive circle of experts from the corporate practice.

As a participant, you will receive the detailed study results and benefit from individual evaluations and workshops, to determine the level of maturity within your company. This allows you to identify and prioritise action fields by comparison to competitors and also view the alignment of your company's project portfolio considering the optimization potential. In addition to comparing the results of

the own organization with the study average, there is also the option to contrast multiple business units or different regions/countries relating to their Sales Performance Excellence.

Regular, star-studded events (Executive Round Tables) with presentations from practitioners and researchers as well as discussions on selected topics also offer the opportunity for professional dialogue and personal exchange on the topic of Sales Performance Excellence. Accompanying publications such as study reports, articles and newsletters on current topics complete the package.

Are you interested? We look forward to hearing from you!

Network and personal exchange Executive Round Tables for participants and interested persons with discussion rounds and special presentations		International best practices Successful methods and practical examples from financial service providers
Consulting expertise In-depth practical experience and cross-industry expertise		Cross industry transfer Transfer of Sales Performance Excellence expertise from industry and service sector
Individual analyzes Peer comparison and derivation of an individual agenda for the chief sales officer		Research centre Studies on the status quo, trends and developments of Sales Performance Excellence in the financial industry

Benefits of the Sales Performance Excellence Network



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