

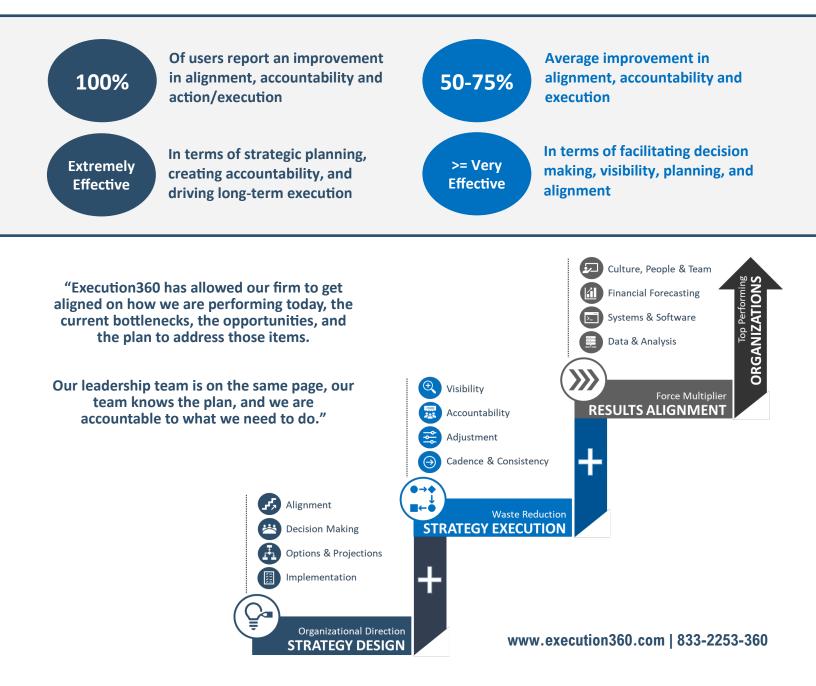
# **Case Studies**

### 360 Business and Technology Platform & Results Multiplier

The 360 platform supports leaders with a "done for you" approach to strategy, alignment, implementation, and ongoing execution

#### THE GOAL IN OUR CASE STUDIES

## Help our Clients to Accomplish their Key Objectives





## Growth Initiative for An Investment Company

"The CRM system that we created allowed us to scale in a way we would not have been before. We have also been able to continually watch our key metrics to determine where people and process need to be adjusted to continue to drive the desired result"

Partner | Business Development

Date: Revenue: Key Leader: 2015—Present <\$5-15M Annual Revenue Partner **Key Goal(s)**: Get full value out of the business model by leveraging technology to scale the business

#### Background

The Company is made of a partners that focus on development and investment. Their mission has been to grow its portfolio of assets with a diverse mix throughout the United States. The Company's success is directly related to its expertise and the effectiveness of its calling strategy.

Key Problem The Company had a proven business model with a few key producers, but had not scaled that to other business development channels.	Key Objectives / Tactics Clarity on key business drivers Design and develop and system to administer the most effective sales process Create a format for adjustments based on data / performance
Key Plan / Strategy The Company's lead client acquisition representative would transmute his strategy into a hybrid CRM / sales process application—to create consistency and accountability through the business development team.	<b>Result</b> The Company rolled out its CRM Companywide (including key partners) and built in process to integrate its data operations as well. The system provided to be very effective for the organization and create unity that allowed the sales team to scale through multiple business development representatives. The Partners were able to seize and monetize the opportunity.

#### 360: Key Metrics / KPIs

Client Facing:	Deals by Rep, Deals by Type, Calling Effectiveness
Internal:	Lead Generation, Data Entry Effectiveness, Sales Rep Pipeline
People/Team:	BD Rep Performance
Infrastructure:	System Effectiveness, Server Uptime, System Usage Rate