

## 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

100%

Of users report an improvement in alignment, accountability and action/execution

50-75%

Average improvement in alignment, accountability and execution

Extremely Effective

In terms of strategic planning, creating accountability, and driving long-term execution

>= Very Effective

In terms of facilitating decision making, visibility, planning, and alignment

“Execution360 has allowed our firm to get aligned on how we are performing today, the current bottlenecks, the opportunities, and the plan to address those items.

Our leadership team is on the same page, our team knows the plan, and we are accountable to what we need to do.”



## 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

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

### 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.

#### Result

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