



A Midwest financial services firm recognized that its first generation leaders were the primary rainmakers. To achieve its growth and expansion goals, there was a significant need to build the business development skills and results of its next generation leaders. The SalesGame approach provided the firm with a business development platform that allowed for skill building at all generational levels and ease of knowledge transfer from the first generation to the next.

The SalesGame team and firm leaders collaborated to structure a multi-year, customized solution to address the need. This plan consisted of foundational workshops, role playing, individual and team coaching using “live” opportunities, and streamlining the management of the business development activity. It also included institutionalization of the SalesGame approach with ongoing training and coaching as part of onboarding new members of the professional team. In addition, the firm promoted more intentional cross-generational teaming in business development planning and meetings.

Over the course of the work, the firm has successfully adopted the SalesGame methodology and embedded it into its culture. It has transitioned from the original “lone wolf” / individual approach to more of a team concept where appropriate in its business development activities. In terms of the overarching goal, the firm is well on its way to developing a next generation of effective rainmakers; thus, ensuring the sustainability of the firm for years to come. Furthermore, it has also experienced a discernable increase in organic growth as a result of its business development activities and efforts.