

# Sales & Service Consulting



Cannon Financial Institute's consulting process discovers where you are today and provides the vision, strategies, and tailored implementation plans to take you to where you want to be tomorrow.

***We know how.***

*Let us help you define and achieve your growth strategy using our proven approaches.*

# Cannon Consulting f

*Does your group's contribution meeting your CEO's and Shareholder expectations?*

*Does your client experience differentiate you from your competitors?*

*Are you optimizing your opportunity for success by breaking down internal silos?*

*Do Centers of Influence view you as the premier provider in your market?*

With Cannon Financial Institute as a strategic partner, you will have access to state of the industry knowledge from experienced professionals who offer actionable expertise regarding organizational change, practice management, and client relationship management.

Cannon has unparalleled success with advising organizations.

## ***Cannon Consulting delivers advice using a two-fold process:***

### ***Strategic Planning***

Define or refine your optimal sales and service delivery model:

- Understand your vision for the business.
- Discover your current sales and service environment-specific issues interviewing senior leadership and client-facing associates.
- Analyze and compare findings to industry best practices.
- Develop recommendations to bridge identified gaps, and discuss preliminary findings with management.
- Present final solutions and gain agreement on your strategic vision.

*Financial Services firms are either defining or refining their sales and service processes to enhance their competitive edge.*

### ***Tactical Execution***

Connect your strategic vision with implementation and sustainment tactics:

- Identify significant success factors for implementation.
- Identify your leverage points, including:
  - Change management concerns
  - Employee role and responsibility impact/employee engagement
  - Organizational structure
  - Incentive compensation plans
  - Recognition and rewards environment
  - Managing and coaching skills
  - Implementation and execution processes
  - Information and activity reporting
- Develop an implementation plan that is built around your unique issues and our industry experience; including absolute deliverables and timelines.
- Suggest best practices for your communication plan to engage key constituents.
- Support the discipline needed to execute the sales and service process through proactive sustainment monitoring and coaching activities.

# For Sales & Service

Cannon's rigorous 5-step Consulting Process provides a high-impact client engagement. Our clients experience a focused and disciplined process, resulting in the best possible strategic decisions and tactical priorities. What differentiates Cannon from other consulting organizations is we remain with clients after the consulting phase to execute the plan.

*Install a sales and service culture specific to your organization.*

Levels of engagement are based on either the complexity of your organizational structure or the number of specific lines of business involved in the initiative. A consulting engagement typically completes within 30 to 60 days.



**By helping you design and execute a thoughtful, detailed, and customized plan, Cannon Consulting moves your organization to...**

*Define or refine your sales process model.*

*Convert your vision to actual field activities.*

*Establish work processes, activities, and skills that reflect your organization's culture and competitive advantages.*

*Ensure the plan is executable.*

*Provide an overlay for managers to successfully guide and coach.*

*Achieve measurable and meaningful results.*

**Financial Services firms focusing on the following lines of business should consider Cannon Consulting:**

Wealth Management  
Personal Trust  
Private Banking  
Business & Commercial Banking

Brokerage  
Insurance  
Institutional Management  
Retirement/Employee Benefits

Cannon’s mission is to take your professional and support staff to the next level, resulting in an unparalleled client experience and an accelerated revenue boost.

As your strategic partner, we work with you to identify and then embed what is distinctive and unique about your organization in key aspects of professional development. Our approach results in:

- An unmatched professional development experience.
- Direct and sustainable impact, to the organization.
- Professional understanding of what to do and how to do it.
- An executable framework for building business.
- Professional development solutions that are focused, relevant and strategically invaluable.

**Cannon customizes the following areas of your organization plan:**

- Sales Leadership
- Recruiting
- Team Effectiveness
- Practice Management
- Client Interaction Skills
- Technical Financial Knowledge
- Sales Support
- Systems & Processes Support
- Product Knowledge

