



# ORANGE *leaf* CONSULTING



## Fidelity National Title Group Case Study using the OLC Methodology

**Challenge:** Fidelity National Title Group (FNTG), which represents Fidelity and Commonwealth, has excellent products and services; however, they could not surpass their competitors in some markets. Therefore, FNTG decided to sharpen its company focus on increasing market share. Marybeth, a state manager for a key market, was identified as a key employee in executing this new focus. With a strong marketing and auditing background, Marybeth had been exposed to basic sales training when she first moved to South Carolina to open the state operation, but did not consider herself a salesperson (a vital skill to increase market share.) Although FNTG has the lion's share of the market in South Carolina, the company's focus was clear and Marybeth knew she needed to hire a sales coach to get her operation to the next level. Her mindset was to lead by example and learn how to become a successful salesperson to inspire her team.

**Solution:** Throughout the course of the assessment, Marybeth encouraged her team to be completely honest and transparent with the OLC assessors. She assured them that there would be no judgments made, but they would have to speak up if something was not working. Thanks to this transparency, we were able to garner a clear picture of what was and was not working at Fidelity and Commonwealth. The key areas that needed fine-tuning were talent restructure, goal setting, working a sales methodology, and increased accountability for sales activities.



First, Marybeth had excellent employees and a strong team atmosphere. However, roles needed to be shifted to better leverage everyone's skill set. We executed a restructure, with transparency, which allowed each individual to best utilize their skillset. Marybeth was able to set clear expectations for her team that didn't exist before including establishing budget goals each year that included organic growth goals. OLC was instrumental in emphasizing the need to measure those goals for accountability purposes as well as a continued effort to raise the bar; additionally OLC was helpful in pointing out that there needed to be consequences if goals were not met. With this structure, her team was able to be more successful because of the parameters she set, and with everyone in more successful roles, the team spirit and morale grew even stronger.



Second, we discovered one of Marybeth's greatest strengths was her understanding of data, numbers, and budget. Her auditing background provided a strong foundation for numbers; however neither she nor her team were translating these numbers into goals for each agent, or sales activities. Goals seemed arbitrarily set and not regularly visited. Due to this, there was no strategic focus on how to achieve goals or understand the efforts and strategies needed in order to reach the desired market share. This challenge was dovetailed into our incorporation of a sales methodology that would track all activities and goals and allow for a more strategic look at goals through data.

The sales methodology Marybeth's team was using was working, but not to its full potential. The company was successful, but again they could not surpass their market competitors. They needed to shorten their sales cycle and spark different conversations in order to move the needle. Here, in conjunction with Marybeth and her team, we developed a customized OLC Blueprint. (Similar to a CRM, the OLC Blueprint tracks the sales cycle by individual and activity for each prospect and client and funnels information into the overall agency goals.)



From there, we worked individually with each sales rep to coach them on using the new sales methodology and properly track everything in the OLC Blueprint, rolling out a true consultative sales approach. We set goals and expectations using the OLC Blueprint and shifted our sales process to a more consultative approach that would truly partner with our clients to help them be more successful. The focus here was to switch from monitoring the income component to monitoring actual levels of success in seeking, qualifying, and signing a new customer, which shortened the selling cycle and began realizing revenue very quickly. Using this method, sales reps set goals through understanding where they were, where they wanted to go, and how to get there. Goals were no longer arbitrary or unmonitored but rather set strategically, and visited regularly. Additionally, these goals allowed Marybeth to have deeper coaching and accountability conversations with her team, making all of them stronger.

**Outcome: The Fidelity and Commonwealth Companies have shortened their sales cycle, held themselves accountable to goals, and increased total revenue; and Marybeth's operation continues to take market share each quarter – they anticipate for the first time ever to be #1 in market share this coming year. The OLC Blueprint was critical to the success of this team and they continue to use it, which has continued to add substantial revenue to the bottom line. This additional income comes from increased wallet share from existing clients as well as realized income from the majority of their new customers signed after only two or three months after their contact date. Their ability to track progress, hold themselves accountable, and measure progress has allowed for continued success.**

## THE OLC PROCESS



### ASSESSMENT

Determining solutions for you begins with an initial assessment. Plain and simple, we have to get to know you, the culture of your organization, and the people we will be working with prior to suggesting a course of action. Trust us, you'll thank us for it later, and your results will show it.



### STRATEGY

We help you plot the course for desired outcomes, helping you create your plan every step of the way. That could mean anything from leadership development, sales cycle revamps, organizational communications, or even employee engagement. Your custom map will take you to where you need to be.



### IMPLEMENTATION

Making your map and plan a reality may seem like the tough part, but this is fun part! This is where you start to see the magic happen, and we will coach you through it. We will unlock the potential you and your team hold and help you avoid the blind spots you don't see. You and your team will fly higher than you thought was possible because we will help you focus and stick to the plan you made.

### ABOUT DR. CINDY & OLC

The road to success is paved with thorough planning and thoughtful execution. I grew tired of watching companies hire consultant after consultant while achieving marginal results. You and I know that it is time to get real. If you are not ready to roll up your sleeves and do the work then don't hire OLC! But if you are ready for real change then let's work together to create real action and real results for you!

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