



ORANGE *leaf* CONSULTING



ASSESSMENT



STRATEGY



IMPLEMENTATION

EPIC Case Study using the OLC Methodology

Challenge: Eric had the desire to enter the insurance industry and become a broker but was a fresh college graduate with no experience. To gain exposure to the insurance business, he worked in the claims sector for several years until the timing was right for him to move to the sales side of the business. While he had a great understanding of insurance at this stage, Eric had no sales experience or training and he needed to develop sales skills and systems to succeed.

Thirty days into his new role, Eric was sent to a sales seminar where an OLC coach taught some basics from the Orange Leaf Consulting (OLC) Sales Methodology. This gave Eric the fundamental building blocks for a sales system and enough of a foundation to begin the journey to a successful salesperson. After two years as a broker, Eric's book of business was growing but not at the rate his manager wanted. He showed drive and promise but needed more sales training to garner his desired growth.

Solution: At the time, EPIC did not have a formal training process, therefore Eric had to seek outside training. He had been impressed with OLC during his brief training with them at the start of his brokerage career so he went back to them to build his sales skills.



Eric's assessment revealed two key things: 1) he had the drive and determination to succeed 2) he did not fundamentally think of himself as a salesperson.



We began training Eric in our sales methodology from A-Z. Coaching him on how to build a book of business through techniques such as: building a sales pipeline and funnel, setting goals, calculating activities needed to reach his goals, targeting, building touch points, how to make cold calls, scheduling appointments, asking the right questions, asking for the business, handling objections, and creating a client engagement plan.



This provided him with overall structure and system to follow through the entire sales cycle. Fortunately, due to Eric's natural drive, he learned the system quickly and speedily; the perception he had of himself transformed from a non-salesperson to a solid, successful salesperson.

Outcome: As Eric began using the sales methodology and the structured system, his sales skyrocketed. “I did something people never accomplish in 5 years. It would have taken me 10 years, maybe 20, maybe never,” said Eric. He went from \$0 in revenue Year 1 to \$2M in revenue in Year 5. He increased his sales by 7X and wrote over \$600K in revenue his best year. According to Eric’s supervisor Paul Lindsay, Senior Vice President of Principal and Programs, “Eric is much more focused and learned to prioritize and therefore be more effective. He is developed beyond his years which I attribute to good mentors including Cindy from OLC. She was able to help us see our blind spots and not create new ones.”

Almost a decade later, Eric continues to use the sales methodology and is one the highest performers at EPIC. He claims, “The amount of money you can make using OLC’s sales methodology is endless – and I mean that.”

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!

Email me at cmcgovern@orangeleafconsulting.com

50 California Street, Suite 1500
San Francisco, CA 94111
415.277.5901

@1stLadyofSales

www.orangeleafconsulting.com

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