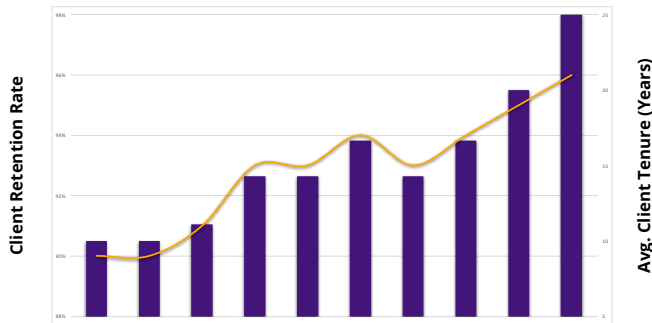


Global Financial Services Company Breaks out of the Pack with salesEQUITY

Client Relationship Success



salesEQUITY's client engagement platform improves sales process, drives behavior change and increases client retention to 96%

A leading Fortune 500 company providing businesses with financial solutions. Faced with slow organic growth, coupled with a difficulty retaining clients, salesEQUITY turned customer feedback into actionable data.

Challenge

- Commoditizing marketplace
- Slowing organic growth
- Difficulty retaining clients
- Need to differentiate on exceptional client experience

Client

Fortune 500 Global Financial Service Company

salesEQUITY Approach

- salesEQUITY 1:1, buyer to account team
- Relationship Assessment feedback for all clients (multiple buyers per client account)
- Self-assessment and action planning for each buyer drives behavior change
- Custom practices and tailored tactics library, client engagement process and account team skill development and coaching

Client Success

"With salesEQUITY we get visibility into our 'at risk' clients. We were given an action plan that allowed us to course correct and strengthen relationships that were identified as outliers. Since implementing the salesEQUITY client engagement platform we've increase retention rates to 96%"

VP of Client Success



About salesEQUITY

salesEQUITY is a client engagement platform designed to collect, analyze, manage and distribute quantitative customer insight data. By measuring client engagement, our proprietary modeling technology determines trends and establishes benchmarks to help drive VOC and client feedback initiatives.

Learn More About Our Platform

Our platform features highly-customizable modules, in an easy-to-use platform, that turns customer feedback into greater sales revenues and boosts engagement through retention

[Tell Me More](#)

