

## CASE STUDY

# TIAA Improves 11% with Janek's Sales Training Solutions

## Summary

TIAA sought a sales training partner who could provide a long-term, sustainable solution that enabled a universal language and sales approach, increased client lifetime value, improved efficiencies of client meetings, and reinforced the key fundamentals of selling.

Through interviews with senior leadership, an organization-wide digital survey, and day-to-day shadowing of Field Consultants and stakeholders, Janek gained full fluency of TIAA's sales processes and challenges, resulting in the development of a tailored and holistic sales training solution.

**96% of training participants were able to apply their newly acquired skills within the first month**

## About TIAA

TIAA is a Fortune 100 financial services organization that provides retirement financial planning and insurance services to a variety of industries. The company employs approximately 13,000 people and utilizes their wide range of products and services to support and strengthen members' financial well-being.

Founded in 1918 by renowned philanthropist and businessman Andrew Carnegie, TIAA has over a century of exemplary customer service – including being named Best Overall Large Fund company by Lipper for six consecutive years and honored with four straight Lipper distinctions as the Best Mixed Assets Large Fund Company.

## **The Challenge**

TIAA identified a need for their Field Consulting Group, many who lacked formal sales training, to receive sales training that would be consistent, sustainable, enable a common language and process, and be capable of being embedded in their onboarding process.

## **The Solution**

After selection, Janek engaged in a deep dive to thoroughly understand TIAA's sales process and challenges. Strategies involved in this pre-training period included interviews with senior leadership, an organization-wide digital survey, and day-to-day shadowing of Field Consultants and stakeholders.

Upon completion of this phase, Janek determined a multi-pronged approach was necessary to achieve TIAA's objectives. The tactics included a customized Critical Selling® Skills training program with industry-relevant terminology, examples, scenarios, case practices, and role-playing exercises.

The training was designed to be conducted nationally, through digital and instructor-led approaches. To ensure sustainability and long-term behavioral change, Janek also provided TOPS® Reinforcement & Coaching to managers, a Train-the-Trainer certification process, and customized eLearning modules.

Over the course of several weeks, instructor-led training sessions were delivered to a national Field Consulting team, including its Directors. Post-training reinforcement included TOPS exercises, skill-based webinars, group discussions, discussion of trained topics in company newsletters, on-demand eLearning technology, sharing of success stories, and real-deal coaching.

**“The leadership team and I are confident that the Critical Selling Skills methodology provided us with measurable productivity gains, improved outcomes, and continued growth in line with our values – continuing to deliver excellence and putting our clients’ interests first.”**

**Catherine McCabe**  
Senior Managing Director

## The Results

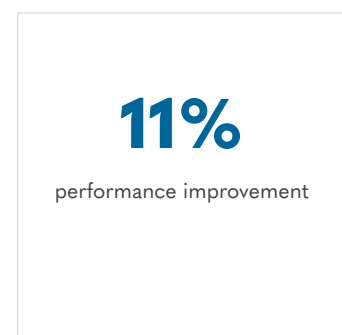
As a direct result of the training initiative, TIAA Field Consultants have experienced more wins, and the organization has exceeded several internal benchmarks for sales and service success.

The training also received high praise from participants – including almost all of the participants stating the training helped them win new business or deepen relationships with currently existing clients.

**“The curriculum and design of the overall training plan were spot-on and helped us put the skills into practice right away. The Janek training facilitators expertly delivered the training that kept everyone engaged and ever entertained while learning.”**

**Catherin McCabe**  
Senior Managing Director

## Post-Training Review Results



**We want to learn about your specific sales challenges.**

Contact us to see how we can help your organization achieve its sales performance goals.

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