# Use Case
European Bank

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Are you a bank selling products and services via a network of branches or resellers ?

European bank using Qollabi for increased productivity and efficiency.

Distribution of financial products and services through 650 branches

This European bank distributes credit, investment products through a channel of around 650 branches. The commercial support team has +/- 400 branch managers, 40 cluster account managers and 3 regional managers divided over several geographical regions.

Headquarters is well equipped with an internal team supporting field and branch teams with material, coaching and marketing campaigns. They also have an extensive team of data scientists providing loads of data.

HQ

Cluster & Regional Managers

650 Branches

400 Branch Managers

3000 Employees

Branches
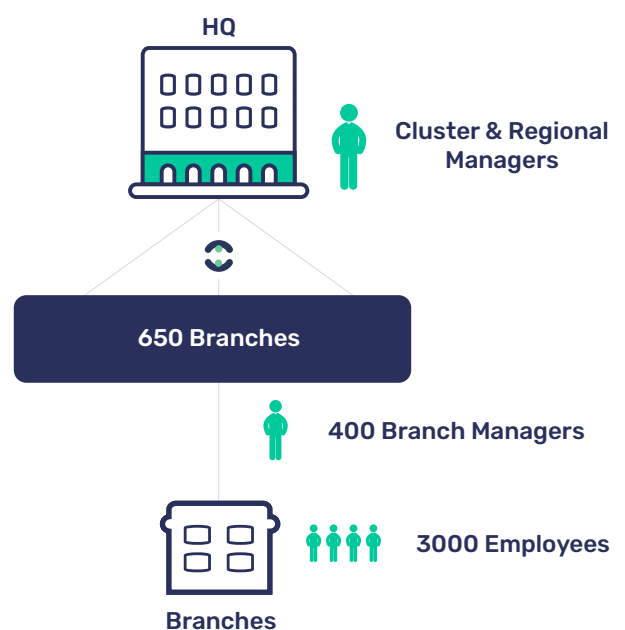
We can summarize the most critical processes of the bank in the following way:

Commercial focus: how to keep commercial focus and offering the right products at the right time to the right person?

Considering the heterogenous tasks in a bank office, the company realized how important it is to be efficient and effective with time. Employees can easily be distracted while executing operational tasks. Every branch knew exactly the amount of commercial selling time and therefore the available sales capacity.

Structure and follow up: how to steer teams from distance?

The company installed a methodology for training and managing sales processes in order to make the sales process more data driven and measurable. The basis of these principles can be found in the book of Jason Jordan and Michelle Vazzane Cracking the Sales Management Code. To help you out, we made a summary of the book.

Data simplicity: how to keep sales teams informed about the most important data, both lead measures (Key Results) as lag measures (Objectives)?

The company installed a philosophy of visual management allowing team members to be informed and alarmed instantly. Data was centralized in a format that could be used to connect to Qollabi's API or any other data source.

Making the invisible visible

**Making the invisible visible: weekly plans made on a flipchart, white board, email, spreadsheet etc.**

Although the bank had already installed a clear vision on 'Activity Based Sales Management coaching' and visual management, the weekly and daily planning process in the branches was still old fashioned. They faced the following challenges:

➡ Our branch managers all have a different approach, we don't know which one is the best?

➡ If already we make week plans, it is made on a flipchart, white board, email, spreadsheet etc.

➡ Looking at the CRM data and spreadsheet are cumbersome and not actionable.

➡ As a cluster manager I'm always on the road and don't know what's happening in the branches when I'm gone.

➡ All our branches are different, so it's difficult to apply a segmentation that makes sense.

➡ We don't know what activities/support have an impact on sales.

➡ We have so many data but we don't use them.

➡ We have a huge potential in being more efficient and productive, but we don't know where to start.

Unlocking the invisible with BRM

WHAT

The end result displayed in your CRM and dashboards
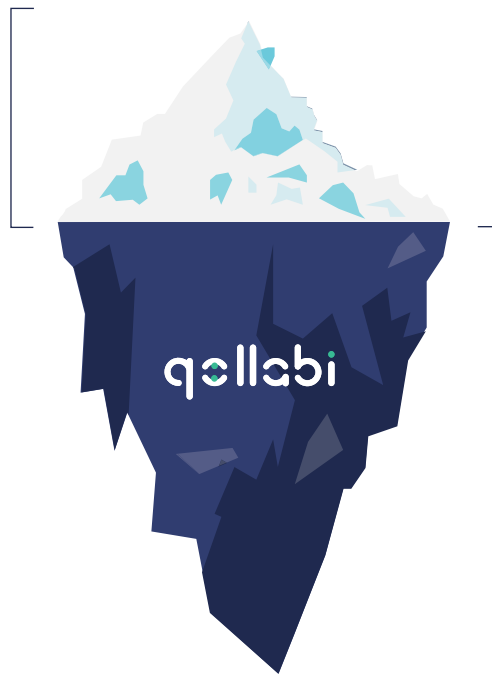
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HOW

The road to getting effective results is often hampered by decentralized plans in spreadsheets, templates, and flipcharts

Qollabi BRM
Business Relationship Management

PLAN: define clear and measurable goals and activities.

COLLABORATE: involve teams and ask for commitment.

MEASURE: connect the right data and send regular updates.

Standardized way of working leading to more efficiency and productivity in the network of branches

The bank decided to implement Qollabi BRM software that would support their methodology of Activity Based and Visual Management.

To increase the chance of adoption of the new strategy and tool, the company took into account some important guidelines:

1 **Leader led:** leadership involvement is key to make sure users understand why they use Qollabi and a new way of working.

2 **Step by step roll-out:** the company decided to start with a proof of value with a couple of key users from an older and younger age group and from different regions.

3 **Methodology first:** Qollabi was nicely embedded in their methodology and sales management principles, tools should support people and processes, not the other way around.

Standardized way of working leading to more efficiency and productivity in the network of branches

The use of Qollabi led to the following fundamental changes in the commercial organization:

- Standardized way of working for all branch, cluster and regional managers based on three steps: plan, collaborate, measure.

- Empowerment and entrepreneurship of branches based on their weekly plans.

- Daily check-ins with the branch teams.

- Activity based management.

- Digital collaboration and coaching based on a plan.

- CRM Data connected to Qollabi providing an instant overview on the most important objectives and the underlying actions and activities.

- Based on feedback from our customers, implementing leads to a potential uplift of up to 10% in terms of efficiency and productivity gains.

> *BRM is important for us because it's the missing link between facilitating the management of activities (the HOW) and the objectives one wants to achieve (the WHAT).* **- Project Sponsor**

Want to discover how Qollabi can help you? Schedule a discovery demo with one of our team members specialized in the bank industry.

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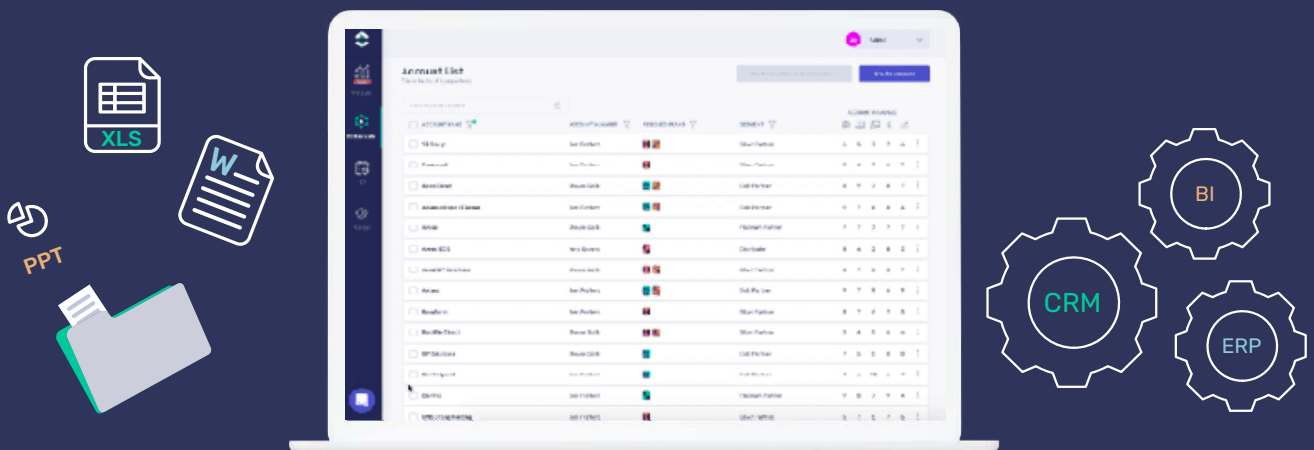**Global Account Ex.**
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Welcome to a New World of Partner Collaboration

Qollabi BRM software is designed for companies working with agents, branches, distributors, dealers, brokers, resellers etc.

Centralize Your
Business Plan

**Collaborate With Your
Business Partners**

Integrate With Your
Data Sources

Learn more

Ask a Demo

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About us

Qollabi helps you to build stronger relationships with your business partners. We call our software BRM: Business Relationship Management Software.

We especially developed it for professionals managing indirect sales channels like agents, branches, distributors, dealers, brokers, resellers etc.

Our customers choose Qollabi BRM because of increased commitment and accountability. Both, within their own organization as between them and their business partners. Want to know more? Discover what Qollabi can do for you.

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