



Case Study



Situation:

UHY, a National CPA and Consulting Firm, was looking to help their CPA staff with sales and relationship building skills. The main goals included:

- New business development skills must be taught to the “newer” primary staff
- The local economy was creating challenges in new business opportunities
- Existing relationships were more inclined to consider competitive solutions

Impacts:

Due to the above situation the following impacts were identified:

- New business acquisition at the required levels was becoming more difficult
- As the market changed, the need for change in new business development increased
- The ability to create value in the minds of clients was becoming essential

Solution:

Partners and sales and marketing executives within UHY sought assistance from a consulting firm specializing in the training of the needed sales skills, best practices and techniques. UHY wanted the training to be interactive, team orientated and thought provoking. UHY understood that the training would cover topics that would be awkward for many participants to implement and therefore knew the facilitation of the training would be critical.

The search for a partner providing the above solution led them to The Sales Matrix, Inc.

The Results:

- Completed exercises surrounding the necessary skills created the opportunity to change the new business development approach for UHY.
- Practice led to the confidence needed in order to successfully obtain new business for UHY.
- Next steps and action items were developed assisting with the accountability towards implementation and eventually habit of the newly acquired skills.