

# EMPOWERING PFM ASSET MANAGEMENT TO TRANSITION FROM PRODUCT-LED TO VALUE-CENTRIC

## EXECUTIVE SUMMARY

PFM Asset management wanted to upskill their sales team and customer engagement approach, to help improve outreach to new clients and drive growth opportunities with existing accounts. The team engaged the value experts at Genius Drive to develop customized in-person value sales training, empowering sellers with new content and skills to create new opportunities, win more business and drive expansion revenue opportunities. As a result, the account managers were able to substantially improve the number and quality of new opportunities, improve win rates on new business acquisition, and achieve asset management growth within existing accounts.

## CHALLENGE

Many asset management firms have a very similar approach to their customers. Tell them all about the firm, the team, history and products. Very little connection is made to the customer challenges and how the firm might be able to solve those challenges. As a result, almost all asset management firms struggle to differentiate, all looking and sounding very similar, and very few inspire prospects to change.

PFM Asset Management wanted to stand out and differentiate their entire sales approach, from the first outreach through the account management relationship.



**Company:** PFM Asset Management



**Industry:** Financial Services.



**Business Model:** PFM Asset Management is a financial services firm specializing in public sector, non-profit foundation asset portfolio and invest management.

<https://www.pfmam.com/Home/>

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Genius Drive empowered our team with the right content and training to pivot from pitching our firm and products, to better connecting with buyer challenges and articulating our unique value, leading to major wins and record growth.

– STEVEN ALEXANDER,  
MANAGING DIRECTOR, PFM ASSET MANAGEMENT

### IMPLEMENTATION PROCESS

Genius Drive collaborated with the PFM Asset Management marketing and sales enablement teams to:

- ✓ Conducted virtual and in-person training sessions and workshops to help overcome key selling challenges and up-skill the sales teams.
- ✓ Leveraged the PIVOT inspired value storytelling method to help sellers transition from explaining products to educating buyers on key problems and co-visioning solutions to deliver significant business outcomes.
- ✓ Created better outreach capabilities, to help proactively generate new business.



### RESULTS AND BENEFITS

With Genius Drive’s help, the PFM Asset Management team was able to:



**DETERMINE FOR YOURSELF HOW A VALUE-CENTRIC APPROACH CAN REVOLUTIONIZE YOUR BUSINESS STRATEGIES AND OUTCOMES.**

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