

CASE STUDY



Strategic Financial Solutions was able to increase new leads by 69% month-over-month, boost total deals by 26% in a single quarter, and more, with Ambition.



Build Culture. Win Deals.

ambition.com

ABOUT



Strategic Financial Solutions is an award-winning financial services firm dedicated to releasing people from the burden of debt. Since its founding, their team of 800 people and counting has successfully resolved over \$1 billion of debt and funded more than 100,000 client loans.

Industry: Finance

Headquarters: Amherst, NY

Ambition seats: 235



IMPACT NUMBERS

Impact numbers:

With Ambition, Strategic Financial Solutions was able to boost calls by 35%, increase credit pulls by 24%, increase pitches by 24%, and grow total deals by 26%, all in a single quarter. The team was also able to increase new leads by 69% and boost active deals by 49% month-over-month.

“We're always looking for new metrics to measure, and with Ambition, we can change the metrics we're scoring on at any time to pursue goals. We love the flexibility because our business is always changing. And it's always been great working with the Ambition team. Every time we need something, they're on it.”

- KELLY HASPEL,
SALES SYSTEMS ASSOCIATE,
STRATEGIC FINANCIAL
SOLUTIONS



DRIVING MOTIVATION WITH COMPETITION & CLARITY

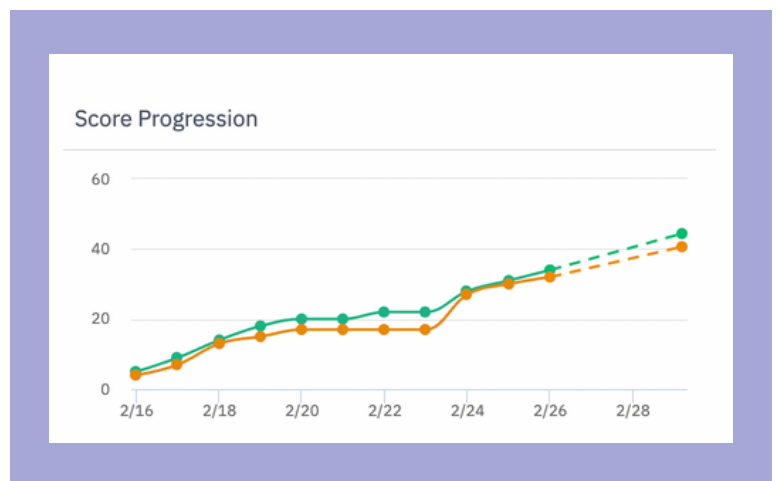
The **Strategic Financial Solutions** team uses Ambition to track, manage, and **gamify sales goals** and to **consistently coach** their team toward bigger and better wins.

The Challenge:

Strategic Financial Solutions needed a way to not only drive meaningful behavioral change, boost sales activity, and increase key metrics, but also a way to begin coaching their sales team to meet goals and continue growing in their roles. The team traditionally used manual methods to gamify sales, and they didn't have a clear way for the team to view metric growth or analytics in real time. They needed something to help create clarity and drive upward momentum.

The Solution:

The Strategic Financial Solutions team uses **Ambition's gamification features** to go beyond manual contests the team previously documented on clipboards and rolled dice for! Now they're able to automate that process and set clear, visible goals for activities like pitches, total deals, and calls. Ambition's gamification software drives their sales activity by **adding a healthy dose of competition into the mix**, creating continuous forward momentum as sales reps compete for the top spot hitting priority targets.



They weigh activities with points using **Ambitions scorecard features**, and the team displays rep standings on **Ambition leaderboards** that can be easily accessed and viewed across the organization to **keep everyone motivated and accountable**. Reps and managers alike can clearly and easily **visualize progress at any time**, from anywhere, and reps can experience the instant gratification of seeing their numbers go up.

As Strategic Financial Solutions continues to grow, they are shifting their focus to begin developing new standardized coaching for team members. **Ambition's coaching features** have given them a head start, allowing the team to plan coaching and training initiatives for additional improvement and clarity across the organization. Coaching allows leadership to **get ahead of any potential problems and coach their team through barriers** to their target activities or end goals.

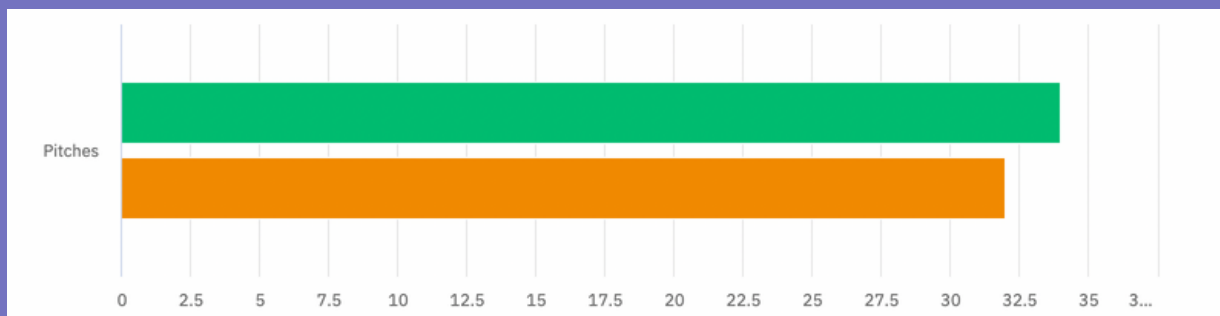
HOW THEY DID IT

The Solution, Simplified:

- **Competitions** on pitches, total deals, and calls to motivate the team to focus on key activity targets
- **Leaderboards and scorecards** for clarity on how reps are progressing toward priority goals
- **Coaching** for continued growth, motivation, and accountability across the sales team



This competition score shows how competitors are measuring up to one another on gamified goals.



CONCLUSION

Strategic Financial Solutions keeps using Ambition to motivate metric-driven results and coach their team **into the future**.

Strategic Financial Solutions was looking for a solution to not only gamify sales activity for metric-driven behavioral change, but also **to surface real-time results**. Ambition's leaderboards on competition and scorecard standings keep all sales activities **visible and accounted for**. With Ambition, the team was able to **rapidly see results on key activity types** to boost growth in pitches, calls, leads, and more. And new coaching initiatives have been easy for the team to tackle with **accessible coaching software**.



35% more calls in a single quarter



26% more total deals in one quarter



24% more credit pulls in one quarter



69% more new leads month-over-month



24% more pitches in a single quarter



49% more active deals month-over-month

100% more  **AMBITION**.

ABOUT AMBITION

The #1 sales performance software, **Ambition** transforms sales teams into revenue engines. From **coaching** and **analytics** to **TVs** and **contests**, our features make it easy for sales leaders to draw smart **insights from data** and **create a culture of success**— so that every rep can **drive revenue** in a powerful, **measurable** way.



[Get a demo at Ambition.com](https://ambition.com)

