

Salesloft.

# NFP Establishes Sales Process and Benchmarks, Facilitating Organizational Change

CASE STUDY



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# NFP Establishes Sales Process and Benchmarks, Facilitating Organizational Change

Even with revenue of \$1.46 billion and a solid growth trajectory, NFP knew that accelerating growth required more centralized and clearly defined sales goals.

By transferring sales knowledge from its seasoned producers to its newer and growing sales teams, NFP could develop a modern sales process for its next generation of sellers. Salesloft's activity tracking and Salesforce integration made NFP reps' lives easier immediately. Salesloft Analytics provided NFP's Sales Enablement team with the insights it needed to establish KPIs, helping teams measure success and ramp new recruits across offices.

# Who Is NFP?

NFP is a leading insurance broker and consultant providing specialized property and casualty, corporate benefits, retirement, and individual solutions. The company enables client success through the expertise of over 5,800 global employees, investments in innovative technologies, and enduring relationships with highly rated insurers, vendors, and financial institutions. NFP is the fifth-largest benefits broker by global revenue and sixth-largest US-based privately owned broker.

## NFP AT A GLANCE

Over

70,000

corporate clients



270+

offices across  
the United States

40+

international offices across  
the UK, Puerto Rico & Canada



5,800+

employees



Challenge:

# Steering a Decentralized Sales Org Without a Modern Sales Process

Most of NFP's sales professionals (a.k.a., producers) were accustomed to relationship-building the traditional way: handshakes, dinners, and ballgames.

Well-connected and relying heavily on their networks, NFP producers were full-cycle sellers who sourced, developed, and managed sales opportunities from beginning to end.

Over the past five to ten years, NFP transitioned to become a more connected and integrated organization, yet sales and the sales process still needed more cohesion and focus. When the company acquired local or regional firms, the owners (and often the most successful sellers) took on leadership or operational roles.

These transitions slowed revenue growth and, without a consistent sales process, regional leaders struggled to train and ramp junior producers.

Given the manual nature of each sales transaction, it was difficult for the company to track producer activity effectively. Like many organizations, NFP suffered from a lack of CRM adoption among its producers, who found little personal value in keeping it up to date.



## Challenge: Steering a Decentralized Sales Org Without a Modern Sales Process

*continued*

Without visibility into what producers were doing to make or miss quota (or even how much revenue some producers were bringing in), NFP couldn't provide sales support or replicate success across the company.

"We were a \$1.46 billion organization with random sales goals at the producer level," said Kyle Healy, SVP, Sales Enablement at NFP. "We had no sales enablement, no sales ops, no sales management, and no national sales leader."

The sales organization had to identify what success even looked like. Then it could establish a standard for its producers that was more than just a number they needed to achieve.

NFP had another challenge, too. Offices historically operated independently, so any new sales process had to strike the right balance between centralizing support and allowing regional leaders to maintain autonomy: **help the managers without managing them.**

While attending a Salesloft conference, Kyle had a lightbulb moment. **The answer to NFP's challenge was to offer Sales Engagement to the regional offices.** Technology and standards for onboarding, ramping, and training would provide the guardrails each office needed to help producers perform better and with more consistency.

"What NFP was looking for was software, but what we ended up realizing was there was so much that we didn't know," Kyle said. "Everyone at Salesloft was very helpful and more than willing to share time to help us figure out where we needed to go and how to build some of the foundational elements that would allow the software to successfully get us there."

*It wasn't just the software. It was the people, the consulting, the guidance, the support, and the expertise that made us pick Salesloft.*

Kyle Healy  
SVP, Sales Enablement  
NFP





Solution:

# Activity Tracking and Analytics Provide Invaluable Process Insights, While the Platform Keeps Reps Motivated

Kyle's sales enablement team began a systematic rollout of Salesloft. For Kyle, the biggest immediate value was the data from [Salesloft Analytics](#). The aggregation of activities helped his team glean insights to formulate a sales process.

Producers using the platform saw instant efficiency gains. Not only was Salesloft easy to use, it was helping them aggregate calls, emails, and social touches in one place, saving time and avoiding context switching. And with the Salesforce integration, producers didn't need to log activity in Salesforce anymore.

The initial vision for the rollout was to start small, using a stair-step approach with a group of dedicated users in certain regions. But a global pandemic had other plans.



Solution:  
Activity Tracking and Analytics  
Provide Invaluable Process  
Insights, While the Platform  
Keeps Reps Motivated  
*continued*

With in-person interaction grinding to a halt, producers could no longer rely on those traditional relationship-building moments in sales — like bringing a prospect to a Yankees game. **In an instant, everyone became an inside sales rep.**

Demand for Salesloft within the organization skyrocketed. “My team spent the next two months onboarding,” Kyle said.

*“People were calling and saying, ‘I have to get Salesloft today. So, we went from having a handful of dedicated users to everybody trying to figure out how to do more, and do it better.’”*

Kyle Healy, SVP,  
Sales Enablement at NFP

Given the instability in early 2020, NFP couldn’t use revenue generation as a way to measure producer effort. So sales managers sought other ways to keep reps engaged and motivated.

During that time, using Salesloft became something of a mental health check, helping managers understand if producers were doing all right, and providing reps with daily activities to prevent them from spiraling.

Managers began communicating: “For the time being, let’s not worry so much about dollars in the door. Let’s just focus on doing the right things and finding the right people and engaging with them through the platform.”

From there, NFP saw enterprise-wide adoption of Salesloft.





Results:

# Establishing Benchmarks, Holding Reps Accountable, and Building Revenue-Generating Cadences

One of Kyle's goals for the first year of implementation was to establish benchmarks and KPIs to measure sales manager and producer success, as well as his own team's effectiveness.

Salesloft Analytics provided visibility into what was working and what wasn't, helping the team establish those baselines.

Since NFP had equipped producers with the right support and ways to track and measure success, **for the first time in the company's history, it was able to hold producers accountable to creating individual business plans detailing how they'd make their numbers.**

Salesloft facilitated other breakthroughs, too. NFP's retirement division, while operating on most of NFP's technology systems, did have a unique sales technology tool. Once introduced to Salesloft, that division moved away from this homegrown sales tool and aligned itself to the rest of the organization by adopting the same processes and technology for sales.



Results:  
Establishing Benchmarks,  
Holding Reps Accountable, and  
Building Revenue-Generating  
Cadences  
*continued*

At the time of this transition, one of the retirement division's new hires began setting up cadences in Salesloft. In his first 12 months at NFP, he generated more leads than 10 other reps combined.

Because this one producer was creating enough opportunity flow for them all, the other reps could abandon lead generation and focus on what they did best: **closing and consulting.**

Shortly after this discovery, NFP ran a campaign to drive prospects to a webinar series. Within a couple months, this young producer created so much webinar attendance using Salesloft cadences that NFP generated **over a million dollars of new revenue** just among webinar attendees.

As a result, NFP ended up restructuring the producer role to better fit the varied skill sets across its sales organization.

*With Salesloft, we were able to reverse-engineer the activities necessary to meet pipeline goals and convert leads to opportunities that drive revenue.*

Kyle Healy, SVP,  
Sales Enablement at NFP



Results:

## Establishing Benchmarks, Holding Reps Accountable, and Building Revenue-Generating Cadences

*continued*

Instead of full-cycle selling, most producers now focus on early and mid-funnel activities, serving opportunities to more tenured sellers.

Once NFP has entered the formal buying process, it uses subject matter experts to close deals and offer ongoing consulting services.

Today, producers across all NFP lines of business are using Salesloft.

While many companies had to revise their sales goals in 2020, NFP accelerated its implementation of a modern sales model to meet its original 2020 sales goal.

“We’re starting to hit this really cool inflection point where the acceleration and adoption of Salesloft is probably four-fold from what we’ve seen the first two years. But that came after five or six years of trying to figure out how to implement more progressive sales trends before finding Salesloft,” Kyle said.

“Now that we have all the data and proof to reinforce our processes, the platform is gaining more traction every day, even among our sales veterans.”

## Industry Leader

- #2 retirement plan aggregator firm according to Investment News
- #5 best place to work in insurance as ranked by Business Insurance
- #5 largest benefits broker by global revenue, as ranked by Business Insurance
- #6 largest US-based privately owned broker, as ranked by Business Insurance
- #9 commercial lines agency, based on 2019 property and casualty and commercial lines revenue, as ranked by Insurance Journal
- #10 largest property and casualty agency by total 2019 revenue, as ranked by Insurance Journal
- #12 global insurance broker, as ranked by Best’s Review
- #13 largest broker of US business, as ranked by Business Insurance

# Want to learn more about how a Sales Engagement platform can help you, too?

Check out our guide

[The Sales Tech Stack: Your Guide to Sales Engagement](#)

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For more information about Salesloft and the  
Modern Revenue Workspace™, visit [salesloft.com](https://salesloft.com).