



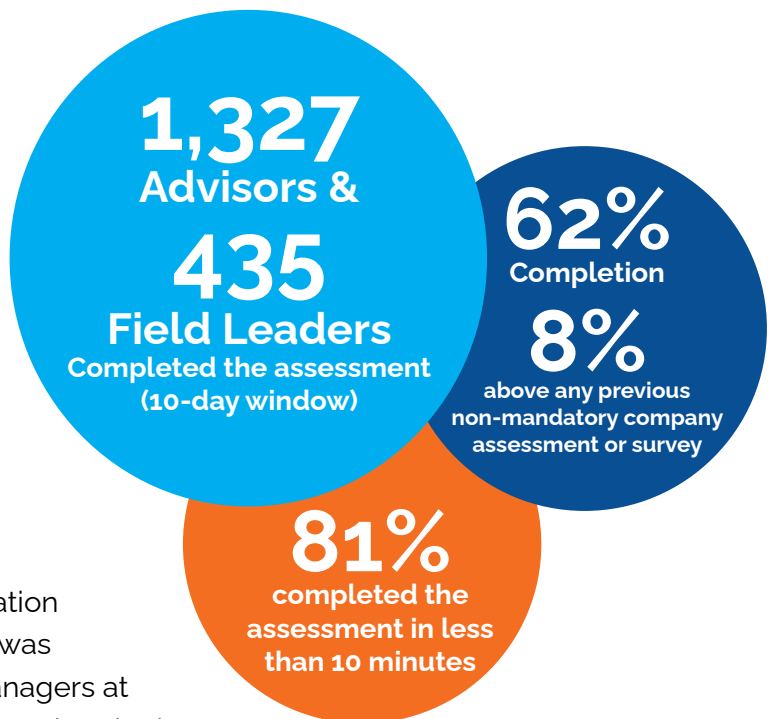
Financial Services Advisor Network

Client Case Study

Financial Services Organization:

Background & Challenges

The commercial organization who is responsible for the captive Advisor network wanted to evaluate the efficacy of the reward & recognition programs rolled out year over year to the Advisors and Field Leaders. The purpose of the audit was to objectively evaluate if the 15+ programs available to the Advisors are eliciting the "right" behaviors.



The MotiveX Blueprint Solution

Since the industry, incentive programs, and compensation structures were heavily cash based, leadership felt it was critical to understand what drove the Advisors and Managers at their foundational or intrinsic levels. MotiveX was selected to deploy their Motivation Blueprint Solution, which includes an evidence-based intrinsic motivation assessment to all Advisors and Field Leaders. MotiveX also designed a custom survey to analyze sentiment of the current reward offerings. Following data collection and analysis, MotiveX partnered with key stakeholders to design and develop a strategic activation plan.

Remarkable Results

- The legacy cash-based recognition programs were NOT important drivers for the Advisors (#10 of the 10 motivational factors)
- Having a voice in decision making processes (Influence) was the most significant motivational friction point (Gap) across demographic and geographic segments for their Advisor audience.
- For the Regional & District Field Leaders, Recognition was the dominant motivational factor directly correlated to engagement and productivity.
- Each District had an average of between 20-25% of Advisors that fell in the "High Risk" category for being extremely disengaged and/or high turnover intentions. The fact that 80% of these "High Risk" Advisors were found to be in the middle-upper performance quintiles made these motivational insights very timely and critical coming out of the pandemic selling landscape.
- The motivational findings mapped to demographic and IC performance data unearthed significant issues previously unknown to the commercial organization.

Financial Services Organization:

Conclusion

With the realization that cash-based Recognition is not the driving factor for Advisor engagement & success, they plan on re-allocating substantial budget into communications and internal VOC process along with developing an updated leadership coaching and eLearning curriculum.



Partner with MotiveX

MotiveX helps organizations and teams succeed by focusing on what truly motivates them. We don't just try to change people; we use our unique Blueprint process to understand what drives your team and create a better work environment. Our Blueprint process starts with insights, but we know that's not enough. We work with you to create a clear plan that fits your team's unique needs. By mapping out motivations and identifying key performance indicators (KPIs), we tailor our approach to unlock potential and make positive changes across your organization. Together, we'll challenge the norm, ignite potential, and foster a culture of excellence. Whether it's boosting engagement, enhancing productivity, or retaining top talent, our Blueprint process is designed to empower your team for long-term success. With MotiveX, you're not just getting a solution; you're starting a journey to better performance.

To schedule a free consultation, email Matt Johnson at mjohnson@motiveX.ai call or text: 1-610-608-7278
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