

Client Case Studies

MASTERSHIP





Stile Education is a start-up focused on providing innovative and engaging science lessons for primary and secondary schools.

As a maturing start-up and having just gone through a period of rapid growth and change Stile was looking to embed further a sales philosophy focused on delivering value to the customer and establishing long-term client relationships.

With a subscription business model, Stile is reliant on long term client relationships.

Stile was looking to continue their success and growth. They saw the Mastership program (workshop and coaching) as a way for their

commercial team to find a consistent approach to developing relationships.

The initial Mastership workshop established the approach that the Stile commercial team aspired to. Follow up coaching helped to transfer the practice to the Sales Manager's daily work.

A YEAR ON: Stile has continued to grow, both in clients, revenue and staff. After the success of the first program, Stile asked Anthony to come back and to run a second workshop for new sales team members. This program helped ensure the new hires would follow the same client-centric approach to sales that helped Stile to achieve its growth.

“Anthony brought his extensive sales experience and strategic outlook to help us shape and execute on our sales strategy. As well as guiding us through the defining and refining of our processes, AJ coached the whole commercial team as a group and individually on Mastership, with a focus on deeply understanding our customers and building meaningful relationships. Anthony's work led to higher performance, better results and happier customers.” BYRON SCAF - CEO

"The results speak for themselves: I'm managing my clients more effectively, making them feel looked after, earning their commitments...and not losing a single one. Mastership is an essential practice for anyone working in relationships. Powerful stuff."

Danny Pikler
Head of Education
Stile Education

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Strategy First Financial Planning, an independently owned financial planning firm, sought out Anthony Joseph to develop the client skills of its people, a mix of experienced and new Financial Planners.

Continuous improvement is part of Strategy First's DNA. Client skills are critical to its long-term growth strategy. Strong client relationships are a win-win. Clients get the best financial outcome. And Strategy First grows through new client referrals.

Ambitious and innovative, Strategy First recognised investing in the client skills of its people would pay dividends for years to come.

Strategy First wanted to fast-track the process of teaching its new planners higher level communication skills and to elevate the client skills of its more experienced team members.

The Mastership workshop established a new approach. Flexible, fitting their existing process and designed to enhance Strategy First's ability to grow relationships built on trust.

Follow up coaching supported the team to apply Mastership to their daily work with new and existing clients. Adopting the Mastership tools has enhanced how the team capture and share their clients' stories in a way that also meets best interest obligations.

A YEAR ON: Strategy First have strengthened their place as industry leaders. This status has been recognised twice; with Patrick Anwandter, Managing Director, named one of the Top 50 Financial Advisers of 2017, and Rhys Phillips, nominated for Financial Advisor of The Year.

“Mastership has helped us create better outcomes; diversified service offering, greater cooperation with accounting partners and ultimately better outcomes for our clients.”

Patrick Anwandter – Managing Director

“There are competitors in the marketplace (Australia & US based) who are ‘coaches’ for advisors, but they are a lot less personal and are very much about following a ‘process’ or script. Whilst I see what Anthony does as changing the DNA of the advisor so they are a better listener, relationship builder and therefore advisor.”

David Price

Founder & Director

Strategy First Financial Planning

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Is your team ready for a boost?

Start the conversation today.

Contact Anthony Joseph:



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