

# NUVEEN

## Nuveen

Chicago, Illinois

[www.nuveen.com](http://www.nuveen.com)

### Business Objectives

-  Align messaging of Nuveen with TIAA, provide consistency
-  Enhance sales training without disruption to existing processes
-  Provide timely training in the face of ever-changing market forces
-  Leverage education to support firm growth

## Nuveen Increases Sales Knowledge and Effectiveness by Adopting Allego

### *Mobile Video Solution Serves Up Timely and Relevant Content for Sales in a Rapidly Changing Market*

The ability to evolve and grow is challenging for any organization, especially those in the turbulent financial service markets. Longevity is a testament to success, but also a recognition of knowing when to strategically evolve and align resources. One such steadfast enterprise is Nuveen, a premier global asset management firm founded in Chicago in 1898. With nearly 3000 employees and nearly \$900 billion assets under management, Nuveen made an important step in its 118-year history when it was acquired by TIAA in 2014. Today, Nuveen provides investment solutions to individual investors and the advisors who serve them.

The alignment and training of Nuveen's sales team is a critical function, led by Joy Crenshaw, Managing Director, Head of Sales Development and Business Solutions. "Our team is dedicated to ensuring the initiatives set forth by senior sales management are sufficiently executed to help the firm meet its sales goals each year," says Ms. Crenshaw. Her team is responsible for onboarding and training new sales staff, providing continued education of tenured sales staff and coordinating the activity of Nuveen's affiliates, all aimed to maximize effectiveness in the field.

### **Evolving Processes Without Disruption**

Faced with a number of challenges, each individually daunting, Ms. Crenshaw and her team must ensure Nuveen's salespeople have the training they need to be successful. The Nuveen sales team competes in a rapidly and constantly changing market, involving any number of market-disrupting events such as the Brexit vote in the United Kingdom. At the same time, as the sales organization grows, Nuveen messaging must adjust to realign with the new combined TIAA organization. The ultimate goal is to provide engaging, relevant content to increase the effectiveness and performance of the Nuveen sales organization.

Ms. Crenshaw learned about Allego from her counterparts at other financial services organizations who were achieving success with Allego. Allego's elegant, easy-to-use interface and powerful capabilities to support various training requirements were a great fit for the Nuveen team.

### **Introducing Allego**

Ultimately adopted by more than 250 team members, Allego was implemented

in phases, rolled out in two-week increments. Nuveen's initial approach focused on content creation where they sought to rapidly capture and share field knowledge and best practices across groups. Outside investment affiliates created additional content to complement internal resources. Nuveen quickly built out a valuable library within Allego containing a wide array of videos across different asset classes. As opposed to the previous "stove-piped" manner of sharing best practices and information on weekly sales calls, Allego ensured the sales team had access to this valuable content at the time of greatest need, even in the field on their mobile devices.

### Success and Expansion

After the initial successful adoption period, Nuveen began to expand the scope of how Allego was being used. The Director of Sales Implementation found Allego to be a helpful tool to increase the sales team's selling skills. Nuveen also encouraged their affiliates to incorporate Allego into their communications, ultimately creating custom channels for their content. Nuveen ultimately expanded the number of users due to high demand, and further increased the number of content contributors.

Ms. Crenshaw recognizes the value Allego provides to Nuveen sales team members who now receive on-demand information from affiliates in an engaging way, through video, at any time that fits their busy schedules. For example, said Ms. Crenshaw, "In no uncertain terms, our sales team flocked to Allego to view our experts and their views on the [Brexit] situation. This helped the team in their conversations with advisors to share the Nuveen perspective on an important global markets issue."

### Conclusion

Nuveen's sales training team addressed numerous challenges using Allego. In quantitative terms, the sales team has more time during Weekly National Sales calls to focus on selling activities and can feel confident that field knowledge and best practices will be easily accessible to them anytime, anywhere. "Qualitatively," says Ms. Crenshaw, "we are able to bring timely, relevant market information that would have normally taken days or weeks to bring to the sales team."

With the successful adoption of Allego thus far, Ms. Crenshaw plans to leverage Allego for other compelling business purposes throughout Nuveen. "We would like to make Allego an integral part of the sales efforts at Nuveen, and enhance our sales managers' ability to coach their teams. We would also like to make Allego an essential tool for onboarding new hires and continued education of existing employees."

*"In no uncertain terms, our sales team flocked to Allego to view our experts and their views on the [Brexit] situation. Within 24 hours, this helped the team in their conversations with advisors to share the Nuveen perspective on an important global markets issue."*

*Joy Crenshaw,  
Managing Director,  
Head of Sales Development and  
Business Solutions  
Nuveen*

### About Allego

*Allego provides an intuitive sales learning platform that boosts sales performance by harnessing the power of mobile devices to transform enablement and training through video content sharing. With Allego's mobile-first platform, organizations can create and curate the best content from the field and corporate office to better train and collaborate with sales teams, without the time and expense typically associated with in-field coaching or on-site training. Users can easily access relevant, quality content, anytime, anywhere, allowing them to capture their best ideas, master their pitch and accelerate their performance. Tens of thousands of global users across a range of industries have adopted Allego to improve sales success. Explore further at [www.allego.com](http://www.allego.com).*