

Nuveen Shares Content and Best Practices for Stronger Selling Using Allego



INDUSTRY: Financial Services | COMPANY SIZE: 2,000+ | LOCATION: United States

The Challenge

After Chicago-based global investment manager Nuveen successfully adopted Allego for new-hire onboarding and product training, Sales Development Manager Mike Ianni received continual requests from the sales force for more sales content – current, relevant content delivered in the flow of work. Although reps loved the content and information exchanges that took place at national sales meetings, very few would participate when Ianni scheduled conference calls to discuss top pieces, trends, tips and best practices.

Solution

- ❏ Ianni decided to more fully exploit Allego’s utility as a content management tool by tasking high-performing sales reps and subject matter experts to capture their knowledge and best practices using video.
- ❏ With the buying of influential reps and leaders, Ianni was able to quickly develop a stream of valuable content for a new biweekly newsletter. Each edition now features three videos on topics that the sales leaders have identified as timely and relevant.
- ❏ After rolling out the newsletter, Ianni then launched a twice-weekly “newscast,” which has further boosted engagement and excitement among the salesforce.

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Mike Ianni
Sales Development Manager
nuveen

Results

- ❏ Allego has become “part of the vernacular” of the entire sales team, delivering timely, customized content that accelerates sales
- ❏ Nuveen also uses Allego to share exclusive internal-use-only content, helping to enhance the dialogues that salespeople have with their financial advisor clients. Today, “the reps are actually able to see what the top sellers are doing, using Allego to learn from each other,” says Ianni.

