

# RETAIL BANKING CASE STUDY



## The Challenge

In the world of banking, branch managers typically serve as a firm's "feet on the street." Yet, regional managers (RMs) within the retail banking division of one global financial services firm **lacked visibility** into branch managers' competencies for building the business within each branch, ability to conduct product training, and selling skills.

RMs also lacked a simple, efficient way to communicate the weekly and monthly initiatives as well as other **dynamic information** to the branches.

## Solution

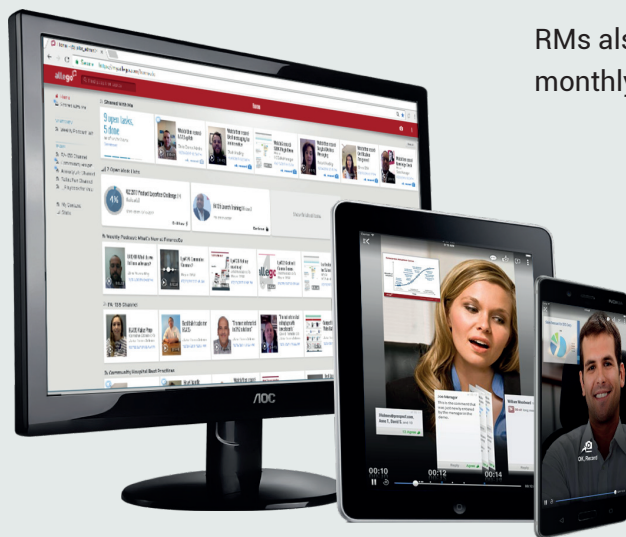
The bank rolled out Allego's sales learning and coaching platform to hundreds of RMs and thousands of BMs to drive efficiencies and promote collaboration using interactive video.

- RM's shortened Monday meetings and pushed dynamic content out to the branches through Allego.
- Branch managers shared in-branch successes with their peers as well as RMs.
- RMs spread these internally sourced best practice across other regions.
- Overall, RMs gained visibility and Allego drove much needed efficiencies across the entire branch network.

## Results

What started as a one year pilot, turned into a firmwide rollout within four months.

- 22% increase in cross selling
- Consistent messaging throughout the branches
- Increased collaboration across the distributed branch network



"Allego gave us the tools to circulate key information throughout the branch network at a velocity not possible before"

Head of Retail Sales,  
Retail Banking Division



## About Allego

Allego's sales learning and coaching platform elevates sales team performance by combining training, practice, coaching and knowledge sharing into one app, streamlined for the rapid pace of sales. With Allego, sales teams onboard faster, confidently deliver the right messaging, rapidly adopt best practices, coach and practice more frequently, and collaborate better with peers and the home office.