

# FocalPoint CASE STUDY

**Roger Gainer** — *Financial Services Consultant*

## **Profile:**

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Roger Gainer is a financial services consultant. In 2003, his firm had two employees and Mr. Gainer handled most of the day-to-day administrative tasks himself.

## **The Challenge:**

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Mr. Gainer's sales were flat, with little or no growth. He couldn't implement a marketing plan and had no method for prospecting and finding new clients.

## **The Solution:**

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Mr. Gainer started the FocalPoint program in September 2003. Session 16, Pareto's Law in Module 2: *Increase Your Effectiveness* helped Mr. Gainer realize that his time is incredibly valuable, so he began delegating tasks to employees, and focusing his efforts on producing—achieving profit levels that once seemed impossible.

Module 3: *Grow Your Business* helped Mr. Gainer plan and implement a marketing program that had been on the “To Do” list for four years. He also learned how to market his organization via a series of financial education seminars that have markedly increased his number of qualified prospects.

## **The Results:**

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Mr. Gainer finished the year 2003 with an 80% increase in revenue. His firm is projecting another 80% increase for 2004, and to double revenue in 2005. To handle the additional business, Mr. Gainer has added an additional staff person and plans to add another producer in 2005.

As a result of his seminars, Mr. Gainer no longer has to “prospect” one-on-one—instead potential clients are seeking him. Furthermore, his seminars have generated another income stream, with profits that are 150% over production costs.

Mr. Gainer says, “It almost seems routine to be earning at a level that seemed out of reach prior to our participation in the FocalPoint program.”

