

# Double-Digit Increases in Sales Metrics

DFIN Drives Revenue after Digitizing Its Product-Line



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Craig Clay,  
President of Global Capital  
Markets, DFIN

## The Client

[Donnelley Financial Solutions \(DFIN\)](#) provides software and technology-enabled financial and regulatory solutions for companies, mutual funds, and investment firms. Its mission is to provide the most secure way for companies to share resources and make deals amidst a sea of ever-changing market conditions and compliance requirements.

Based in Chicago, DFIN spun off from R.R. Donnelley & Sons in 2016, where it had functioned as the financial division for 33 years.

## The Challenge

DFIN’s transformation started with creating a software solution and restructuring as a SaaS Fintech organization. “Early on, we had to make decisions around structural changes on what we were selling, how we were supporting that, and what forward motions would move us toward a software solution,” explains Craig Clay, President of Global Capital Markets, DFIN.

Changing its offerings required updating the messaging around value drivers and differentiators inherent to the new products. In DFIN’s sales model, multiple reps work with each account, so messaging alignment is imperative. The challenge was to align all customer-facing team members around the new sales messaging and value framework.

Deliberation and intention around the change to SaaS proved successful. “All of our clients made the journey with us. The

net result is a stronger go-to-market, a larger client base, and, most importantly, alignment around how our clients want to work,” Clay says.

Changing that business mix also meant changing the sales and go-to-market culture. “That’s how we came to know Force Management,” says Clay. “Our company had not been focused on sales training in the past. Most of our folks are very accomplished and successful. Part of our challenge was building the belief that what we are doing is investing in our sales professionals, investing in their skill sets, investing in how they go to market, and most importantly, how they make more money.”

## The Solution

DFIN signed on with Force Management for [Command of the Message®](#) to help align its teams around the messaging and value specific to its new virtual product line. After early positive results, the company also implemented [Command of the Sale®](#) to ensure that its sales process was aligned with how its customers buy. “The Command of the Sale process ensures that everybody is moving in the same fashion and that our alignment with customers is repeatable and scalable.”

DFIN fostered continuous learning through [Command Center](#), Force Management's digital content hub, designed to reinforce learning and certification program to give managers the tools they need to conduct refresher courses and train new hires on their accelerate adoption. It also secured Force Management's [Train the Trainer](#)® certification program to give managers the tools they need to conduct refresher courses and train new hires on their Command of the Message concepts and framework.

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## Results

The ROI for DFIN was tangible and measurable within months. “Our quarterly reports showed double-digit sales increases in recurring revenue for our core product,” Clay says. “At the end of the day, you want to see success.”

What DFIN gained:

- Double-digit increases in quarterly sales metrics
- Clear ROI based on a multi-year strategic partnership
- A repeatable, scalable process to drive sales success
- Cross-functional alignment around a powerful, uniform value message

Clay reflected on how the relationship with Force Management changed the culture and helped define how DFIN is accomplishing its mission: “Force Management gave us a galvanizing moment to memorialize our purpose. Our work together allows us to go to market in a uniform way and talk in a uniform language. It's a framework we use with almost everything within our sales motion.”