

## Client Testimonial: Howe and Rusling



Interview with  
Craig Cairns  
President,  
Chairman & Chief  
Compliance Officer

### Tell us about your company

*"Howe & Rusling is a relatively small, but growing \$800 million investment management firm founded in 1930. Our focus is not only on our growth but also building and encouraging a sales culture. One of the considerable advantages of being a small firm is that we do not have a lot of established training programs in place and we are willing to try new and different methods to be successful. We are flexible and can be innovative."*

### How did you find out about APTUS?

*"We became aware of APTUS from its success working with premier college athletic programs in the country. The testimonials on the website resonated with me. As an employer, I related to the idea that everyone on the University of Kentucky basketball team learns and processes information in different ways."*

*"Similar to a college or professional athletic team, Howe & Rusling spends a lot of money recruiting, hiring and training employees. Being small, the firm cannot afford to make a lot of personnel mistakes. Athletic teams are often on the cutting edge of evaluation and training in order to get maximum performance out of their players. We felt why should our business be any different."*

### What are some examples of how APTUS helped you?

*"Carol is the most successful salesperson at Howe & Rusling. It turns out she learns by trying many different sales techniques and never actually settles on a single technique. The APTUS reports indicated that Carol works best under minimal supervision. This can be frustrating to a sales manager who may tend to want Carol to find a successful technique and then repeat it over and over again. But based on the feedback we received from her report, we decided to let Carol try to sell to many different types of clients (not just individuals, but different types of institutional clients as well) in many different situations and geographic regions rather than trying to limit her and really let her take the approach she thought was best (written proposals, meetings only, minimal sales material, phone meetings only). Carol is having her best year ever in the ten years she has been at Howe & Rusling and has expanded her geographic territory and type of client she is closing all on her own initiative."*

### What's next for Howe and Rusling?

*"We have been very pleased with our decision to have the entire firm evaluated using APTUS. The results of the evaluation have produced a direct, identifiable benefit to the firm and fit well with our desire to continue to grow Howe & Rusling. We will continue to assess new hires and offer updated assessments as part of current employee's development."*