Advanced Selling Skills – Financial Services

Who we are

Mieza Consulting Pty Ltd is an Australian-based professional services firm specialising in building and sustaining organisational capability. With offices in Melbourne, Singapore and Hong Kong, Mieza is recognised for its ability to design and deliver programs throughout the Asia-Pacific region.

Introduction

This 2-day course has been specifically designed for financial services professionals with customer retention and acquisition targets. The ability to win new to bank customers whilst retaining existing customers is central to growing market share. The course addresses both strategies with emphasis placed on developing sales skills which enable bankers to differentiate themselves, and their bank, in the marketplace. The aim is to ensure that participants are able to compete on value rather than solely on price.

Who should attend

- Corporate and Institutional Bankers
- Senior Corporate Banking Executives
- Product Specialists – Trade, FX, Leasing etc.
- Senior Relationship Managers
- Private Equity Executives
- Client Relationship Managers
- Business Development Managers
- Account Executives & Account Managers
- Consultants involved in selling to financial services companies

Pre-requisite(s)

Prior knowledge of corporate and/or institutional banking.

Sample Course Outline

Global Banking Trends

- Introduction to the global banking industry
- Customer trend analysis – What do they want from a bank?

Advanced Pre-sales Planning

- Pre-sales planning techniques and behaviours
- Understanding the customer's business and industry
- Turning pre-sales planning into a competitive advantage

Customer Needs Identification

- Advanced questioning techniques
- Uncovering the customer's business finance and personal wealth management needs
- How to identify and rank customer needs
- Cross-selling techniques

Developing Solutions

- Selling on value
- Developing customer value propositions
- Advanced pitching skills
- Closing the sale and overcoming objections

Customer Relationship and Opportunity Management

- Advanced Customer Relationship Management
- Managing the "shape" of your pipeline
- Customer retention strategies
- Increasing the share of customer wallet

Course Summary & Conclusion

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