Key Client Pitches & Proposal Management – Private Banking

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 1-day program has been specifically designed for private bankers who are tasked with winning new private banking clients. Wealth management and private banking are amongst the fastest growing areas in financial services. The course is packed with best practice examples with emphasis placed on developing pitching and proposal writing skills which enable private bankers to differentiate themselves, and their bank, in the marketplace. The aim is to ensure that participants are able to walk away with a practical toolkit for managing their client relationships.

Who should attend

- Private Bankers
- Senior Private Banking Executives
- Product Specialists – Tax, Estate Planning, Financial Planning
- Senior Relationship Managers
- Financial Planners
- Client Relationship Managers
- Business Development Managers
- Account Executives & Account Managers
- Consultants involved in selling to financial services companies

Pre-requisite(s)

Currently employed in, or prior knowledge of, private banking.

Sample Course Outline

Private Banking Clients

- Key characteristics – Sophistication, advice, buying behaviour
- Understanding the rank order of customer needs

Elements of a Winning Proposal

- Documenting a highly effective proposal
- Linking client value propositions to client needs
- The three steps: Claim, Value and Proof

Client Pitching Strategies

- Developing highly differentiated client pitches
- Presenting to win – tips and techniques
- Pitching to one and pitching to "many"

Course Summary & Conclusion

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