

Seminar in Albania, Tirana, May 28-30 May, 2018

SELLING FINANCIAL SERVICES AND MANAGING CLIENT RELATIONSHIPS

ORGANISATION SHEET

Objectives	The course will provide the participants with a good understanding of the selling techniques aiming to sell services & products to client and to manage client relationship effectively.
Methodology	The course is a mix of theory and practice. The participants will perform exercises, including negotiation exercises with a prospective client.
Target group	Middle to Back Office Staff of commercial banks and financial institutions who have a need or an interested in improving their understanding of selling financial services and managing clients.
Language	A good command of English is requested
Participants	Maximum 20 participants
Trainer	Mr Alex Kloos He has a 40 years' experience in the Financial and Banking sector. He was a Managing Director in Wealth Management for many years. Since 2016, he is partner in a company specialized in training, coaching & consulting with the focus on transferring his knowledge of financial services and management through training and coaching.
Dates	3 days From 28 to 30 May 2018

Remark: By delivery date, any training documentation shall be subject to regular reviews and updates amending the table of content as described herein.

* One of the core values of the House of Training is pragmatism, the training it provides is therefore: practical, current, modular and targeted. Bank and finance professionals from all disciplines are facing one international challenge in particular, which is to work together to improve the quality of services while reducing costs, within a framework that is increasingly subject to strict regulations and the use of technology. In order to face the challenge of delivering fully-adapted training programmes, the House of Training uses a quality management method that it calls "Quality Circles", that bring together professionals and practitioners from the financial sector with shared goals, philosophy and passion for learning. Our quality circles have an intimate knowledge of the real needs in the industry and collaborate actively with the House of Training to integrate this understanding into our programmes.

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CONTENT

Day 1

Introduction

Agenda of the 3 days

Presentation of each participant

Personality

To develop our personality, we have to cultivate:

Enthusiasm

Perseverance

Method/being organized and methodical

Psychology

Competence:

- technical knowledge of banking products
- technical knowledge of sale

Being yourself

Optimism

Honesty and Loyalty

Triple strength: Moral, Technical and Physical strength

Day 2

How to discover the client needs?

Technics in Communication

Questioning, listening and silence

Different types of questions

Technics in Sales

The art to conclude in ten points

Discover the different services and products

How to discover the real needs and opportunities of the customers

KYC – Know Your Customer

Day 3

Simulation games based on the Macedonian clients, services and products

How to conclude in ten points

Q & A