HOUSE OF TRAINING

THE GOVERNMENT OF THE GRAND DUCHY OF LUXEMBOURG

ATF LUXEMBOURG

Seminar in Macedonia, Skopje, May 29-31, 2017

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 Monday 29 to Wednesday 31 May 2017

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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