



SELLING FINANCIAL SERVICES AND MANAGING CLIENT RELATIONSHIPS

VIRTUAL CLASSROOM

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.
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Methodology	Virtual classroom - Distance interactive learning via Webex. The methodology is based on a combination of theory, interactivity, teamwork and role games (will be further developed in the face-to-face trainings).
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Target group	<u>Bankers from North Macedonia</u> Front office managers, managers of commercial banks and financial institutions who have a need or an interest in improving their understanding of selling financial services and managing clients.
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Language	English
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Duration and dates	3 days 24, 25, 28 February + 1, 2, 3 March 2022 09.00 – 13.00
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Participants	Maximum 12 participants
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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. Professor at the University of Luxembourg, client communication in Wealth Management. 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.
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Platform	Webex
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CONTENT

Personality - To develop our personality, we have to cultivate:

- Enthusiasm
- Perseverance
- Method/being organized and methodical
- Psychology
- Being yourself
- Optimism
- Honesty and Loyalty

Competence:

- Technical knowledge of banking products
- Technical knowledge of sale

Triple strength: Moral, Technical and Physical strength

DISC

Assertiveness

Communication

Technics in Communication

Questioning

The deep Motivations

Different types of questions

Listening, Silence, Objections, Body Language

Discover the different services and products

How to discover the real needs and opportunities of the customers

KYC – Know Your Customer

Technics in Sales

The art of concluding in ten points

Q&A