

- *Improve your account planning and business goal-setting*
- *Learn how to achieve 'trusted advisor' status with clients*
- *Understand how to adapt, influence and negotiate elegantly*
- *Receive a 20-page report on your communication style*



## Relationship Management Skills

### The Journey at a glance



### Schedule:

Each day and individual sessions are carefully designed to allow maximum focused learning in both a cost and time effective environment. This means even the busiest professionals can benefit from our training. This programme involves pre-reading, listening and preparation before each session as well as follow-up exercises and tasks. Our style and learning philosophy enables full delegate participation with questionnaires, experiential games and tasks, video analysis and facilitator-led discussion.

### Introduction

Our training modules have been designed to create an entertaining and educative learning journey that will produce a fully rounded and complete integration of the knowledge, skills and attitude required to maintain and enhance long-term client and business relationships. To this end the sessions have been inspired to provide attendees with core innovative tools and techniques in order to successfully carry out their roles and to represent a benchmark of excellence based on 30 years of interaction and development in this arena.

### Mike Gale – Profile

26 years' experience as a trainer, facilitator and motivational speaker.

A business background based on developing remote client relationships in Iberia, Central Europe, Scandinavia, Asia, Africa, India and the USA.

Synergy5 started with a desk and a telephone, cold calling 3,000 corporates – 200 calls per month to CEOs, MDs and SDs to convert initial meetings into pitching opportunities for new business.

Over 100 clients, from Jones Lang LaSalle to the BBC, Vodafone, McKinsey & Co, Morgan Stanley, Standard Chartered Bank, RBS, Comet, Dixons, the DTi, the US Navy, Standard Chartered Bank, John Wiley & Sons and Elekta PLC

Author of the Sales Manager's Desktop Guide – published by Thorogood in 2000

Accredited practitioner in DISC profiling and The Insights Discovery Behavioural Model

Annual keynote speaker for IOD Sales Conferences and other institutions such as the Fitness Industry Association and the Association of Personal Injury Lawyers.

To achieve a level of excellence, we cover the following areas of development:

1. Account management planning, prioritisation and goal-setting
2. Solution-based selling skills to achieve 'trusted advisor' status
3. Pitching and closing techniques for internal and external clients
4. Live video practice + 1:1 coaching
5. Advanced communication and relationship skills
6. Advanced Influencing
7. 1:1 coaching + Personal Action Planning
8. Cross-selling, networking and pipeline business development
9. Negotiation strategies and tactics

We researched these core topics with clients using a design-thinking approach to reach the following up-to-date conclusions:

- ✓ All key relationships rely on trust to develop into substantive outcomes that are profitable to both parties
- ✓ One of the critical components to developing trust (*The Trusted Advisor* – David Maister) is intimacy and the ability to connect with people at a deeper, conscientious level
- ✓ This 'connection' component needs to combine with four other quantified attributes – Competence, Confidence, Credibility and Concern for others in order to create trust
- ✓ To be intimate requires us to be open and adaptable to the different behaviours and needs displayed by others; this requires a dynamic, flexible approach that remains authentic
- ✓ Client relationship and communication, networking initiatives and leadership and teamwork capabilities all rely on trust-based approaches to create loyalty, responsiveness and engagement

Participants receive highly comprehensive 20-page personal reports that provide detailed analysis of their communication style and how to build on strengths and work with limitations to connect more effectively with their clients.

In conjunction with coaching and training, it will add to their ability to handle client interactions 'in the moment' and to adjust their messaging and approach as a call or meeting progresses.

The information provided in each report regularly receives a face validation score of over 90%, making this one of the most successful psychometric formats offered in the market place.

Participants complete the Insights Discovery questionnaire via the Consulting website prior to attendance on session 5.

A personal, individual comprehensive report is produced and the content will be discussed 1:1 with each participant on the following topics:

- » General overview of the person's main characteristics
- » Decision making style & other attributes
- » How they prefer to communicate with others
- » How they prefer others to communicate with them
- » Strengths and limitations in their preferred style
- » A description of their 'opposite type'
- » How to handle people of opposite type to them
- » Blind spots
- » Suggestions for improving their communication

How we will measure and ensure tangible learning outcomes



- ✓ Design poll questionnaires before and after sessions to assess knowledge take-up and progression
- ✓ Use pre- and post-work tasks to develop layers of learning and trigger application in the workplace as well as during the sessions
- ✓ Provide at least 2 opportunities for 1:1 coaching calls/meetings during the initiative
- ✓ Follow-up on personal action plans and provide short feedback reports for L&D and management
- ✓ Optimise learning through a variety of teaching techniques, including role play, case studies, video, simulations and experiential exercises
- ✓ Draw on the participant Insights reports to interpret and understand specific learning styles and group dynamics

## Schedule



### Introduction to programme

- ▶ Set the scene
- ▶ Introduce facilitator
- ▶ Familiarise participants with platform
- ▶ Outline programme themes, overall content and goals
- ▶ Share expected outcomes

## Session 1 – Account Management & Planning

### Aim

The aim of this session is to:

- ▶ Provide participants with an understanding of key competencies and tools required to successfully carry out the role of a Relationship Manager
- ▶ Review and re-focus account planning, prioritisation and goal-setting targets

### Learning Objectives

By the end of this session participants will:

- ▶ Understand the role & responsibilities of a successful Relationship Manager
- ▶ Be aware of the skills & behaviours required to be an effective RM
- ▶ Appreciate the importance of pipeline and apply the 'business platform' concept
- ▶ Be able to use a process for prioritising client accounts and opportunities
- ▶ Produce account plans to maximise opportunities and revenues
- ▶ Use wallet share assessment and product analysis to support business development
- ▶ Identify the changing needs of clients and how to track these

## Session 1 :

### Business Development Strategies and Deeper Relationship Knowledge – assessing opportunities & increasing profitability

#### Preparation

- ▶ What are the key roles and responsibilities of a world class Relationship Manager?
- ▶ List at least 6 skills & behaviours for being an effective Relationship Manager
- ▶ Prepare for polling on what are the 3 most important attributes (according to Harvard study)

#### Reading/Listening

- ▶ Article on Key account management
- ▶ Handout/video on 'Calculating client Wallet Share'

#### Session Content

Using slide presentation, Group discussion, Whiteboarding, Polling and Q&A

- ▶ Key roles & responsibilities of a world class Relationship Manager
- ▶ Skills & behaviours for being effective in your role – the levels of effectiveness
- ▶ Building a strong business platform – understanding the sales cycle and 'funnel'
- ▶ Changing needs of the clients - how the bank needs to evolve to remain competitive
- ▶ Key account management – prioritising your clients using Johari windows
- ▶ Simple strategies for defending, protecting, growing and expanding accounts
- ▶ Completing a dynamic, forward-looking account plan

#### Post session

- ▶ Select a client and prepare an account plan

## Session 2 – Solution-based Selling Skills



### Aim

The aim of this session is to:

- ▶ Develop consultative selling techniques that create trusted advisor status
- ▶ Show how to use a value-based approach to sell solutions not products

### Learning Objectives

By the end of this session participants will know how to:

- ▶ Prepare for effective meetings and conversations with clients
- ▶ Utilise a structure and approach to identify clients' specific requirements
- ▶ Conduct strategic dialogue to gain deeper insights into clients' broader needs
- ▶ Professionally manage virtual and face to face meetings
- ▶ Package and present tailored solutions to meet clients' requirements
- ▶ Handle client doubts, concerns and objections & gain client commitment

## Session 2 :

### Consultative Value-based Selling Techniques – getting to real needs and trusted advisor status

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#### Preparation

- ▶ Questionnaire on basic communication knowledge
- ▶ What creates trust? Prepare 6 traits and select the most important
- ▶ Questioning skills - Role-play preparation & instructions

#### Reading/Listening

- ▶ Article – The Trusted Advisor – by David Maister
  - ▶ Daniel Pink – chapter from “To Sell is Human”
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#### Session Content

Using slide presentation, Group discussion, Whiteboarding, Role plays

- ▶ Effective preparation and formats for face to face and virtual meetings
- ▶ Developing the right attitude and delivery approach for the virtual environment
- ▶ The S.C.I.L. method for motivating client interaction and developing strategic dialogue
- ▶ Using natural questioning skills and curiosity to uncover real needs and create opportunities
- ▶ 'Implication' questioning to get to a deeper understanding with clients
- ▶ Role plays to practice skills and techniques
- ▶ Linking needs identification to Account Plans and future cross sell opportunities
- ▶ Motivating clients to act – the FAB format: selling benefits not features and advantages
- ▶ Handling client doubts, questions and objections linked to alternative closing techniques

#### Post session

- ▶ Prepare, implement and report back on a client meeting
  - ▶ Apply the 'Quistening technique' to one internal and one external meeting
  - ▶ Carry out a benefit analysis on one client opportunity
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## Session 3 – Pitching to Win & Closing Techniques



### Aim

The aim of this session is to:

- ▶ Develop presentation and pitching skills that are credible & confident
- ▶ Demonstrate how to create a competent internal or external pitch

### Learning Objectives

By the end of this session participants will know how to:

- ▶ Pitch the client credit story and handle internal Q & A with credibility
- ▶ Use storytelling techniques to differentiate ABK from competitors
- ▶ Utilise the A.P.P.A. format to create attention and motivate clients to take action
- ▶ Target the 2 psychological drivers behind most decisions
- ▶ Handle client doubts, concerns and objections elegantly and link to closing
- ▶ Select appropriate alternative closing techniques to gain client commitment

## Session 3 :

Pitching & closing techniques – handling internal and external scenarios to communicate credibility, competence and confidence

### Preparation

- ▶ Select one internal and one external pitch scenario
- ▶ Prepare 1 minute soundbites of opening summary, proposition and closing

### Reading/Listening

- ▶ Article – “Whoever Tells the Best Story Wins” – Annette Simmons
- ▶ DVD clip – ‘How to Get Your Point Across in 30 Seconds or Less’

### Session Content

#### Using slide presentation, Whiteboarding, Polling and Video

- ▶ Using the APPA format for preparing and delivering any pitch
- ▶ How to research and prepare for a professional pitch
- ▶ Implementing the ‘tree’ structure and rule of three
- ▶ Creating attention by applying the BBQ and the ‘pleasure/pain’ concepts
- ▶ The impact of business stories to credibly communicate ABK’s and the RMs capabilities
- ▶ Handling doubts, questions and disagreement – turning negatives into positives
- ▶ 6 ways to close meetings, incite responses and create a commitment to act

### In groups

- ▶ 1<sup>st</sup> Live pitch to camcorder (recorded) with feedback
- ▶ 1:1 coaching call
- ▶ 2<sup>nd</sup> Live pitch to camcorder (recorded) with feedback

### Post session

- ▶ Review 1<sup>st</sup> pitch recording and facilitator evaluator feedback
- ▶ Prepare for 1:1 meeting with facilitator
- ▶ Prepare 2<sup>nd</sup> webcam pitch recording

## Session 4 – 1:1 Coaching - webcam pitch recording



### Aim & Objective

The aim of this coaching session is to:

- ▶ Provide inspiration and constructive feedback
- ▶ Discuss the participant's pitching capability using a 20-point Evaluator
- ▶ Agree areas of strength and aspects for improvement
- ▶ Prepare the participant for a second attempt
- ▶ Identify any other support issues required
- ▶ Allow the facilitator to prepare an interim summary of progress to L&D

## Session 5 – Advanced Communication/Relationship Skills

### Aim

The aim of this session is to understand:

- ▶ How behaviour works to develop trusting relationships
- ▶ The 4 communication styles (or energies) used by self and others
- ▶ Our own preferences and style of communicating
- ▶ The strengths and limitations of different styles
- ▶ The Insights report and how to develop improvement & development plans



### Learning Objectives

By the end of this session participants will:

- ▶ Understand the concept of 'goals' and 'needs' and what drives communication
- ▶ Understand the Insights Model and how behaviour can change and alter
- ▶ Know how to begin using the model to connect with different goals and needs
- ▶ Be able to interpret and prioritise their report to develop personal action plans

★ *This session is powerfully supported using an online evaluator (see page 2)*

## Session 5 :

**Advanced Communication & Relationship skills** – how to create trust and real connection with clients and colleagues

### Preparation

- ▶ Complete the Insights Discovery evaluator online (15-20 minutes)
- ▶ Complete Colour preference chart exercise

### Reading

- ▶ Article on the Insights Discovery Model
- ▶ Slide presentation on Insights tool

### Session Content

Using slide presentation, Whiteboarding, DVD excerpts, Quick tests & Brainstorming

- ▶ Perception and how we are influenced
- ▶ How we use behaviour and communication to operate
- ▶ The concept of goals and needs in communication
- ▶ The Insight Discovery model – the main drivers behind behaviour
- ▶ The four colour energies, how they work and how we achieve our objectives
- ▶ The Dos and Don't for dealing with different energies
- ▶ Your Insights Report

### Post session

- ▶ Read handouts and Insights report
- ▶ Prepare for 1:1 call on Insights Report
- ▶ 1:1 call with facilitator (30-45 mins per delegate)

## Session 6 – Advanced Influencing Skills



### Aim

The aim of this session is to:

- ▶ Develop greater understanding and capability to influence others
- ▶ Develop full confidence in adapting and working with different styles and energies

### Learning Objectives

By the end of this session participants will:

- ▶ Know how to build greater trust and true rapport with internal and external clients
- ▶ Use 'pacing' and 'leading' to elegantly connect with others and achieve mutual goals
- ▶ Work with and use different body language, voice and word cues to influence
- ▶ Know how to connect with different styles, adapt behaviour and influence decisions
- ▶ Be aware of client buying behaviour & decision making
- ▶ Understand different types of buying behaviour to generate both trust and business
- ▶ Be able to apply techniques for increasing client loyalty & relationship longevity

## Session 6 :

**Advanced Influencing skills** – how to identify the energies people are using and how to adapt behaviour and communication appropriately

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### Preparation

- ▶ Review Insights model slides and prepare for test

### Reading

- ▶ Article on 'Body Language' by Allan Pease
  - ▶ Further slides on Insights tool including the effects of stress
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### Session Content

Using virtual training, slide presentation, DVD clips, Whiteboard, Polling and Q&A

- ▶ The impact of body language, voice and words in our communication
- ▶ Understanding conscious and less conscious signals and cues to interpret attitude
- ▶ How to identify the different colour energies in action
- ▶ Pacing and matching different energies authentically
- ▶ Using a 'profiler' to assess client preferences/priorities and develop a communication plan

### Post session

- ▶ Read Insights handout
  - ▶ Use Insights card once a day for 4 weeks
  - ▶ Profile one internal and one external client – write and implement a communication plan
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## Session 7 – 1:1 Coaching – interpersonal skills



### Aim & Objective

The aim of this coaching session is to:

- ▶ Provide inspiration and constructive feedback
- ▶ Discuss the participant's Insights report and agree strengths and limitations
- ▶ Support the development of personal improvement and action plans
- ▶ Provide L&D with a summary of participant capability and challenges



## Session 8 – Negotiating for Results



### Aim

The aim of this session is to:

- ▶ Develop skillful negotiating strategies and tactics to protect value and profit
- ▶ Develop techniques for creating Win/Win outcomes

### Learning Objectives

By the end of this session participants will:

- ▶ Know the strengths and weaknesses of their own negotiating style
- ▶ Identify specific areas to improve their performance in future negotiations
- ▶ Explain the phases and stages involved in a negotiation
- ▶ Deal effectively with different types of negotiators and the five common style
- ▶ Use the Harvard technique to improve their negotiations
- ▶ Prepare and plan for a negotiation in a systematic, flexible and effective way
- ▶ Distinguish between “Concession trading” and “Concession making”
- ▶ Face with confidence their next negotiation using ideas generated from the session

## Session 8 :

### Negotiating for Results – how to prepare objectives and plan for successful negotiations

#### Preparation

- ▶ 3 examples of difficult negotiation tactics
- ▶ Negotiation role plays 1, 2 & 3

#### Reading/Listening

- ▶ Article & Video clip on ‘The Harvard Technique by HBR
- ▶ The five common styles used in negotiation - handout

### Session Content

#### Using slide presentation, Whiteboarding, Role plays & Simulations

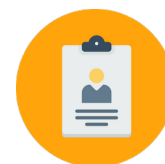
- ▶ The negotiation process: prepare/discuss/propose/trade-bargain/agree terms
- ▶ The role of market information
- ▶ Planning and preparing for a negotiation – setting simple limits and levels (BATNA)
- ▶ Opening positions - what should you say at the start
- ▶ Exploring interests – managing the information exchange
- ▶ Using variables and options - concession-making vs. concession-trading
- ▶ The difference between positions and interests
- ▶ How to make tentative agreements in complex negotiations
- ▶ Using criteria against aggression and willpower
- ▶ What to do if you hit deadlock – handling tough situations and people
- ▶ Closing a negotiation

#### Post session

- ▶ Prepare negotiation planner
- ▶ Personal Action Plan



## Session 9 – Cross Selling & Networking



### Aim

The aim of this session is to:

- ▶ Develop planning and communication initiatives to create more business
- ▶ Broaden the RM profile in the business community
- ▶ Develop and broaden financial products and instruments being used by clients

### Learning Objectives

By the end of this session participants will:

- ▶ Understand the dynamics and challenges of cross selling
- ▶ Implement a number of different ways to stay in contact with clients
- ▶ Use their account planning to identify areas for client follow-up
- ▶ Market new bank offerings to their client base
- ▶ Know how to manage conversations to uncover new leads and opportunities

## Session 9 :

**Cross Selling & Networking** – managing ongoing marketing and building deeper relationship business ties and opportunities

### Preparation

- ▶ Identify two associations, 2 events & 2 media outlets for networking
- ▶ Account plan analysis – share 3 opportunities

### Reading/Listening

- ▶ Complete cross selling Questionnaire & Profile
- ▶ Article – 'Cross selling strategies that Work'

### Session Content

#### Using slide presentation, Whiteboard, Polling and Q&A

- ▶ What is cross selling and Why is it a critical marketing activity?
- ▶ Key skills & behaviours required to successfully cross sell
- ▶ Barriers to effective cross selling
- ▶ Why cross sell, Business & Personal benefits
- ▶ Identifying cross selling opportunities & growing key accounts
- ▶ Product analysis and penetration
- ▶ Using notable events to contact clients
- ▶ Creating meeting opportunities with customers
- ▶ Client thought process
- ▶ Planning the call
- ▶ Structuring & controlling the call

### Post session

- ▶ Select 3 clients to implement cross sell initiative – report back
- ▶ Confirm to marketing initiatives/memberships
- ▶ Personal Action Plan