

Synergy *Greek: synergos – working together...of two or more agents to produce an effect greater than the sum of their individual effects*

Selling Financial Services

Becoming the trusted advisor

This course can be delivered virtually but preferably face-to-face

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This programme can be tailored

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Selling Financial Services Becoming the trusted advisor

2-3 day programme
incorporating role play & dvd clips

✓ OVERVIEW

- ✓ Selling the intangible - the trust factor beyond credibility
- ✓ Understand your own behavioural style and the preferred style of others
- ✓ Know how to build relationships more easily and more deeply
- ✓ Develop your adaptability & influence
- ✓ Identify real client needs and create new opportunities for business
- ✓ Receive personal feedback on your strengths and limitations

OBJECTIVES

Building behavioural skills to:

1. Shape & create selling opportunities
2. Create more impact in client meetings & partnership outcomes
3. Effectively Influence others inside & outside the organisation
4. Build stronger inter-personal relationships & confidence
5. Provide the tools to resolve communication problems & barriers

RESULTS

More productive relationships with clients, peers and stakeholders
Elegant influencing skills that work
Greater self-awareness & impact
Sharper pitching & presentation skills
Improved capability to handle difficult relationships/challenges

TOOLS

The Insights behavioural 'card' for identifying styles & preferences
A comprehensive behavioural report with suggestions and personal action plans
Profiling document
A communication action plan

CONTENT:

1. The Sales dynamic in financial services - why is it different?
2. The 5 critical perceptions we need to shape
3. How to create attention and differentiation
4. The trust formula - 'David Maister' research & application
5. How behaviour is driven by goals and needs
6. Understanding ourselves - how we operate
7. The 4 energies we use in communication - The Insights Discovery model
8. How to identify the behavioural preferences of others
9. Interpreting body language, voice and words
10. Influencing elegantly - the concepts of pacing and leading
11. Implication questioning and the art of listening
12. Choosing flexible responses to get results - being adaptable, authentic and congruent!
13. Difficult behaviour and the concept of 'opposite types' - building rapport with difficult people
14. Profiling people to create focused communication plans to build better relationships, influence and motivate
15. How to authentically pitch ideas and engage your client

Participants complete Insights Discovery questionnaire via the Consulting website prior to attendance on the programme. A personal, individual comprehensive report is produced providing feedback 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
- ▶▶ How to handle people of opposite type to them
- ▶▶ Blind spots - Suggestions for improvement

EACH PARTICIPANT WILL RECEIVE 1:1 FEEDBACK ON THEIR REPORT & GUIDANCE ON SETTING ACTION PLANS

A programme that has been delivered to banks and corporate clients all over the world helping leaders, team members, support staff and client-facing personnel to communicate more effectively and build positive relationships