

## Course Outline

**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

2025-26

A large, bold, light gray number "5" is centered within a solid black rectangular box.

**Mike Gale**

[www.synergy5.net](http://www.synergy5.net)

+44 [0] 7990 573033

[mikegale@synergy5.net](mailto:mikegale@synergy5.net)

This programme can be tailored

## 5

## Selling Financial Services Becoming the trusted advisor

2–3 day programme

### ✓ 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*