



Selling Skills for Client-Facing Staff in Financial Services

In a rapidly changing workplace, selling skills are becoming more and more vital for any employee who is in regular contact with customers, even if that employee doesn't strictly work "in sales". Unfortunately, many people think you have to be a born salesperson to be good at it: this myth needs to end. Everybody can learn to sell in a way that is professional, authentic, helpful to the customer, as well as highly effective.

Selling is a skill, it can be learned, honed and strengthened. In this hands-on course, you will be able to practice a step-by-step sales process, from the initial interview questions, through to concluding a sale. Whether you are making your first steps in the bank industry or have several years' retail experience, you will learn new techniques, assess and review existing practices and strengthen your own performance. Your personal development will also serve your professional development.

Who should attend?

Delegates who are beginning sales people or seek to develop and reinforce their skillset, in any form of client-facing financial services, including banking, fund management, insurance, etc.

Course Outline

- Goal Setting
- Lead Generation from existing and new customers
- Networking
- Motivating referrals
- Time Management
- Interview & Communication Skills
- Surmounting Barriers to the Sale
- Closing the Sale
- Review