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Sales & Negotiations for Financial Institutions

DATE 25th - 26th February, 2020
TIME 8:00AM - 5:30PM
TRAINER Charles Legrand
PRICE €400 for 2 days

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COURSE DESCRIPTION

Selling and Negotiating is something we have done every day of our lives - be it at home, the office or when we are going about our daily business. We all possess the skills to sell and negotiate. This course will teach how we can increase those skills.

What we are not going to teach on this course is “just how to sell”. What we are going to teach by the transfer of information to the attendees is how to look beyond the ‘Sale - Negotiation’. This in turn will help to dovetail the daily challenges with the Key Performance Indicators (KPI). We will cover Banking and Insurance products through interactive Case Studies.

AIMS & OBJECTIVES

- We will discuss and build a Road Map & strategy
- Build a Sales Campaign and plan Sales Timeframes
- We will also look at Sales & Negotiations in varying geographies

What will you gain from this course?

Understand how to **enhance the relationship** with your clients, by **Cross Selling** and **Up Selling**. Learn how to position your organisation, **identify Red Flags**, **build bridges** with your client base ‘beyond the sale’ and Understand how to ‘rescue’ damaged relationships.

Who should attend this course?

- Financial Institutions Senior Sales Executives
- Financial Institutions and Insurance Sales Managers
- Financial Institutions Business Managers

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Methodology

This is a highly interactive course so come prepared to participate and influence the outcome. Comprised of Powerpoint presentations, case studies, discussions and Team Workshops.

Programme

On both dates, registration and welcome coffee is scheduled between 0800hrs and 0830hrs.
There will also be 2 short coffee breaks at 1030hrs and 1500hrs, together with a light lunch between 1230hrs and 1315hrs.

COURSE SCHEDULE

DAY 1

We begin with an introduction to define some basic concepts, principles and follow up with a number of Case Studies.

What is Selling?

- Sales - Negotiations an Overview
- What makes up our definition of Selling and Negotiating?
- Why do we apply certain criteria to achieve success?
- A basic definition of Sales - Selling & Negotiation

Sales & Negotiation

- Who needs these skills within your team & organisation?
- Fundamentally where are these skills used?
- How often are they renewed / refreshed?

The Sales Round Table

- Who are the Common Actors?
- Impact of ‘having no corners’?
- Criteria for your strategic success

Selling - Back to Basics I

- Areas where Sales Teams have the most impact
- Road Map sharing and elongation of relationship
- Traffic Lights - indicate speed of progress & avoiding revolving doors
- Code of business & trust allows advancement

Selling - Back to Basics II

- Evolving the negotiation
- Changing course is key as is following the road-map
- Earning the right to advance is also key - how do we accomplish this?

Moving to the Next Level

- Sort the key issues and focus
- How do you choose your battlefield and who do you take?
- What strategy to employ & how do you choose the product to sell?
- Team building 'Branding' - Exercise

Negotiating Beyond the Road Map (Yes/No)

- What boundaries do you stick to / respect?
- Who is responsible for approving these boundaries / freedom?
- Financials always have to make sense - Y - N?
- Internal kitchen needs to be aware of where you are in the cycle?
- Use Technology to deliver 'more'

Case Study A - Prepare & Deliver (45 mins)

- Cross Selling has to be part of your solution
- Q & A

DAY 2

Negotiating Base Camp - PART I

- Three reasons why we might fail before departing Base Camp?
- Impact of failure and how do we stay in the race?
- Common mistakes in negotiating sales
- What intelligence did we gather - go over it again and check our source
- Go over it again - and check our understanding

Case Study B - Prepare & Deliver (45 mins)

- Who is the client & what is the product going to enhance - Up Selling
- Why are YOU / YOUR Co the solution
- Why are you bidding and events you will put into place to win
- Give us three elements that will result in a Win - Win

Base Camp is Done - Part II

- Competition has surfaced - how do we deal with hurdles?
- Review where we are and how to deal with our challenges?
- Division of roles & responsibilities?
- Key steps forward? - Time to remind the client of your Cross Selling products?

Negotiating Upper Slopes - Prepare for a Hard Climb & Summit

- We need extra gear - people - finance
- New team, substitutes or wholesale changes?
- Specialist team - new approach - don't reject change
- Seniors brought in - 'can be game changers

Final Ascent - 'Oxygen' or Free Climb - Your Choice

- Trust your intelligence - or need to re-evaluate?
- Team needs to be a Team - there is no 'I' in Team
- How well do you know your client - reflect - review and check where you are - key to success & there might be more hurdles
- Reaching the Summit - is not the 'end game'
- Where will decision making and follow up take place?
- Put the criteria down in writing - confirm and take the process forward

Case Study C - New Co - New Logo - Prepare & Deliver

- Work out a New suit of products to your current set of generic products
- Deliver three things to the audience that will move the relationship forward
- Deliver three things to the audience that will restrict the relationship
- Where are you with respect to your competition and how are you dealing with them?

Conclusions - Q&A - Any Other Business

- Summary & closing remarks
- One to One meetings with attendees

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About the Trainer - Charles Legrand

Charles Legrand has a focus on Coaching Sales & Management Teams, Firefighting challenging Projects, opening new Markets and Offices. He is very well-versed in taking 'challenged' Teams and colleagues and Training them to be 'Sales Champions'. Having worked in many countries and with 40 years of Banking / Sales experience, Mr Legrand has a proven track record of getting Projects to start on time and meeting revenue targets.

Charles Legrand has spent 10 years with Swift, managing three separate regions from the UK, ME & India and latterly South Asia. His achievements during this time:

- Tasked with opening an office in DIFC Dubai and Mumbai India (both achieved).
- Successful in increasing Payments and Securities traffic volumes by 15%.
- Payments & Cash Management. Personal revenue target of $5 million of $20 achieved.
- Relationship Management. Personal revenue target of $4.5 million of $55 achieved.

Mr Legrand started my career with Barclays Bank International in the UK and Gulf countries and jumped to the UAE to open two retail branches. He was educated in the UK and in addition to English, he is fluent in Greek and spoken Arabic.

REGISTRATION & PAYMENT METHODS

For further information, call us on **+356 99343171**

To reserve a seat complete, scan this form
and send via e-mail to: **learning@castilleresources.com**

Write a cheque payment to:
Castille Resources Ltd

Mail to:
Castille Institute Casa Leone,
Triq l-Imhazen, Floriana,
FRN 1200

OR

Bank Transfer in Euro Denomination:
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FEES & DISCOUNTS

Course Fee: €400 for both days

20% EARLY BIRD
Not in conjunction with any other offer and when booked
& pre-paid 4 weeks in advance

15% OFF when booking 5+ seats

10% OFF when booking 3+ seats

Students are eligible to a discounted price.
Booking is subject to availability and on presentation
of a valid student card.

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DELEGATE PERSONAL DETAILS

Mr/Mrs/Ms ______________________________

Job Title ______________________________

Company ______________________________

INVOICE DETAILS

Company ______________________________

Address ______________________________

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Telephone ______________________________

Email ______________________________

VAT No ______________________________

TERMS & CONDITIONS

Binding on receipt of the signed booking form, followed with an Invoice.
Please note that payment must be received prior to start of the training session, otherwise settlement must be made within 30 days from the issue of the invoice.

Cancellation

Cancellations made within five (5) working days prior to commencement date of each course will not be accepted and the fees will not be refunded. Substitutions are welcome at any time without any additional charge.

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