

Conversations with Clients

This is a 2-day face to face workshop for platform staff. The purpose is to help staff build mutually beneficial customer relationships by providing remarkable customer experiences and tailored financial solutions.

Well-focused conversations are an effective means to identify, pursue, and mature relationships with new and existing customers.



Objectives

- Identify customer expectations, and plan how to meet and exceed them.
- Connect with customers from the moment of first contact and over the lifetime of a relationship.
- Open a dialogue with customers through good questions, smooth transitions, and listening.
- Match customer needs with bank solutions and make positive recommendations.



Content

- Day One
 - Establish rapport
 - Respond to immediate needs and transition
 - Ask four basic questions to manage conversation flow.
- Day Two
 - Personal and bank value statements
 - Make recommendations and handle client concerns
 - Follow-up and expand the relationship.



Delivery Method

- Face to face classroom delivery by Clarity trainers with option for bank Train the Trainer
- Interactions can be video taped, played back, and reviewed to provide feedback to learners.
- Participant guides include course materials, profiling template and detailed client experience checklist.



Options

- Customization of profiling template.
- The class assumes staff have had some basic sales training. If needed, a one-day "selling the service" basic sales training program may be added.
- For staff with more advanced skills, a day can be added on portfolio management.