MAWA EVENTS

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DYNAMIC CLIENT ENGAGEMENT AND SALES SKILLS FOR FINANCIAL PROFESSIONALS

"Mastering Consultative Selling & Relationship Building in Financial Services"

Schedule

Venue (InHouse)	Fees
At Your Organization Premises	Ask For The Quotation

► **Available delivery methods:** In-House Training

Introduction

In today's competitive financial landscape, professionals must go beyond product knowledge to establish trust, build long-term relationships, and drive value-based sales. This course equips participants with dynamic engagement techniques, consultative selling approaches, and advanced interpersonal skills tailored to financial services. Participants will learn how to uncover client needs, overcome objections, build rapport, and present tailored solutions with confidence and professionalism.

Objectives

By the end of this course, participants will be able to:

- Engage clients using structured, value-focused conversations
- Apply consultative selling techniques in financial interactions
- Understand client psychology and adapt communication styles
- Identify and capitalize on client needs and opportunities
- Build long-term relationships through trust and credibility

Why Attend

- Improve your confidence and success in client conversations
- Learn best practices in sales tailored for the financial sector
- Enhance your influence, listening, and questioning skills
- Close sales more effectively and sustainably
- Build a loyal client base through impactful engagements

Target Audience

This program is designed for:

- Relationship Managers and Wealth Advisors
- Financial Sales Executives and Account Managers
- Private Bankers and Investment Professionals
- Business Development and Client Service Teams
- Anyone in financial services interacting with clients or prospects

Individual Benefits

Key competencies that will be developed include:

- Enhanced communication and persuasion techniques
- Deeper understanding of client motivations and decision-making
- Effective objection handling and deal closing strategies
- Improved ability to tailor financial solutions to client needs
- Increased confidence in face-to-face and virtual sales settings

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Higher client satisfaction and retention levels
- More productive client meetings and relationship growth
- Stronger cross-selling and up-selling capabilities
- Greater alignment with sales goals and KPIs
- A more client-centric sales culture within the organization

Instructional Methodology

The course incorporates:

- Interactive Role-Plays – Simulating real client scenarios
- Sales Frameworks – Applying proven sales and engagement models
- Group Workshops – Peer collaboration on strategies and messaging
- Coaching & Feedback – Personalized improvement suggestions
- Sales Toolkit – Practical templates and communication aids

Course Outline

DETAILED 5-DAY COURSE OUTLINE (Customizable)

Training Hours: 07:30 AM – 03:30 PM Daily Format: 3–4 Modules | Breaks: 09:30 & 11:15 | Lunch: 01:00 – 02:00

Day 1: The Psychology of Client Engagement

- Module 1: Understanding Client Behaviour (07:30 – 09:30)
- Key motivators and decision-making triggers
- Building trust and emotional connection
- Common client personas in financial services
- Module 2: Communication Styles & Listening Skills (09:45 – 11:15)
- Active listening and non-verbal cues
- Adapting your message to the client’s style
- Using empathy and credibility to build rapport
- Module 3: Asking Powerful Questions (11:30 – 01:00)
- The art of open-ended and diagnostic questions
- Uncovering hidden needs and goals
- Leading conversations without pitching too early

Day 2: The Consultative Sales Process

- Module 4: Sales Process Overview (07:30 – 09:30)
- Introduction to consultative selling
- Stages of the client journey: from first contact to long-term loyalty
- Sales as service and relationship building
- Module 5: Need Discovery and Solution Framing (09:45 – 11:15)
- Identifying pain points and financial priorities
- Mapping solutions to client aspirations
- Framing value in client-centric language
- Module 6: Role-Play: Needs-Based Selling (11:30 – 01:00)
- Practice scenario with feedback
- Building a discovery-to-solution storyline
- Tips for probing deeper and handling resistance

Day 3: Influencing and Presenting Financial Solutions

- Module 7: Presenting with Impact (07:30 – 09:30)
- Storytelling techniques for financial professionals
- Visual aids and examples that resonate
- Tailoring pitch structure to individual clients
- Module 8: Handling Objections Gracefully (09:45 – 11:15)
- Types of objections and common causes
- Staying calm, curious, and professional
- Scripts and frameworks for turning objections into opportunities
- Module 9: Role-Play: Objection Handling (11:30 – 01:00)
- Objection-response drills with feedback
- Peer critique and solution enhancement
- Lessons from top-performing salespeople

Day 4: Relationship Management and Cross-Selling

- Module 10: Building Long-Term Client Loyalty (07:30 – 09:30)
- Going beyond transactions
- Creating ongoing value and touchpoints
- Managing expectations and follow-ups
- Module 11: Cross-Selling and Referrals (09:45 – 11:15)
- Recognizing cross-sell triggers
- How to ask for referrals ethically and effectively
- Creating win-win scenarios
- Module 12: Relationship Mapping & Strategy (11:30 – 01:00)
- Identifying stakeholders and influencers
- Account planning tools for long-term growth
- Action planning for top-tier clients

Day 5: Sales Coaching and Personal Sales Plan

- Module 13: Personal Sales Effectiveness (07:30 – 09:30)
- Building confidence and mindset for success
- Time management and goal tracking for salespeople
- Personalizing scripts and approach
- Module 14: Final Presentations & Feedback (09:45 – 11:15)
- Each participant presents a short mock sales engagement
- Peer and trainer feedback
- Reflection on strengths and growth areas
- Module 15: Action Plan & Certification (11:30 – 01:00)
- Finalizing a 90-day personal sales improvement plan
- Commitment sharing
- Review, Q&A, and certification

Certification

Participants will receive a Certificate of Completion in Dynamic Client Engagement and Sales Skills for Financial Professionals, recognizing their advanced ability to lead client conversations, build lasting relationships, and drive financial product sales with professionalism and impact.

Why Choose MAWA Events

- **Global Expertise:** More than 17 years of experience in professional training and consulting.
- **Industry-Leading Faculty:** Courses delivered by seasoned professionals with hands-on experience.
- **Practical Insights:** Learn to turn theory into actionable strategies for real-world business impact.
- **Client-Focused Solutions:** Customized programs designed to achieve your organisation’s unique goals.

In-House / Customized Training	TEL:	EMAIL:
Interested in running this course for your team? Please contact us:	**+601116373203**	**info@mawaevents.net**