



SELLING FINANCIAL SERVICES & MANAGING CLIENT RELATIONSHIPS

DATE: 16 - 18 JANUARY 2019
VENUE: KOSOVO BANKING ASSOCIATION

OBJECTIVES

The course will provide the participants with a good understanding of the selling techniques aiming to sell services & products to client and to manage client relationship effectively.

METHODOLOGY

The course is a mix of theory and practice. The participants will perform exercises, including negotiation exercises with a prospective client.

WHO SHOULD PARTICIPATE?

Middle to Back Office Staff of commercial banks and financial institutions who have a need or an interested in improving their understanding of selling financial services and managing clients.

A good command of English is required

ABOUT THE TRAINER

Mr Alex Kloos has a 40 years' experience in the Financial and Banking sector. He was a Managing Director in Wealth Management for many years. Since 2016, he is partner in a company specialized in training, coaching & consulting with the focus on transferring his knowledge of financial services and management through training and coaching.



REGISTRATION

Send your filled registration forms via email at KBA, or contact us at:

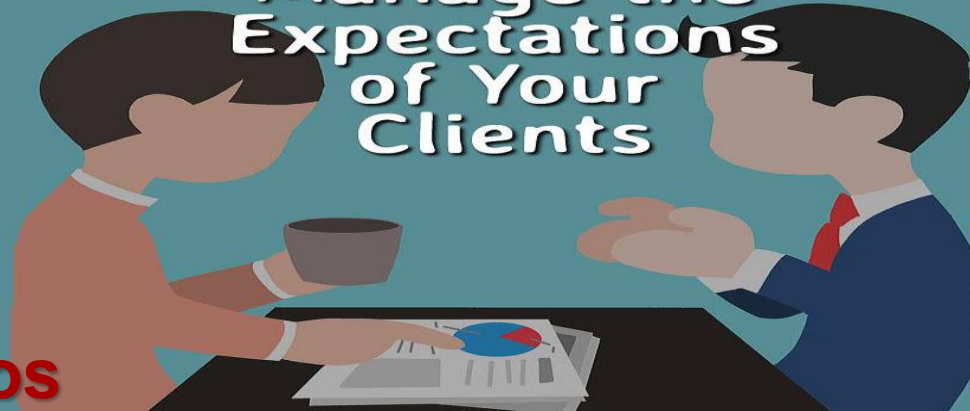
kbatrainingcenter@bankassoc-kos.com or

038 246 171

DAILY SCHEDULE

09:00 – 10:30	Training
10:30 – 10:45	Coffee break
10:45 – 12:00	Training
12:00 – 13:00	Lunch break
13:00 – 14:30	Training
14:30 – 14:45	Coffee break
14:45 – 16:30	Training
16:30	End of day ☺

Manage the Expectations of Your Clients



facilitated by

Alex Kloos

Content

Day I

Introduction
Presentation of each participant
Personality
To develop our personality, we have to cultivate:
Enthusiasm
Perseverance
Method/being organized and methodical
Psychology
Competence:
• technical knowledge of banking products
• technical knowledge of sale
Being yourself
Optimism
Honesty and Loyalty
Triple strength: Moral, Technical and Physical strength

Day II

How to discover the client needs?
Technics in Communication
Questioning, listening and silence
Different types of questions
Technics in Sales
The art to conclude in ten points
Discover the different services and products
How to discover the real needs and opportunities of the customers
KYC – Know Your Customer

Day III

Simulation games based on the clients, services and products from Kosovo.
How to conclude in ten points
Q & A



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