

SELLING FINANCIAL SERVICES AND MANAGING CLIENT RELATIONSHIPS

*Date: from 25 to 27 January 2023
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 methodology is based on a combination of theory, interactivity, teamwork, and role games (will be further developed in the face-to-face trainings).

TARGET AUDIENCE

Front office managers, managers of commercial banks and financial institutions who have a need or an interest in improving their understanding of selling financial services and managing clients.

LANGUAGE

A good command of English is required.

EXPERT

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. Professor at the University of Luxembourg, client communication in Wealth Management. 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.

PLACE DURATION DATES

Face 3 full days of face-to-face training
From 25 - 27 January 2023
Training Room of KBA, Pristina, Kosovo

CONTENT

Personality - To develop our personality, we have to cultivate:

- Enthusiasm
- Perseverance
- Method/being organized and methodical
- Psychology
- Being yourself
- Optimism
- Honesty and Loyalty

Competence:

- Technical knowledge of banking products
- Technical knowledge of sale

Triple strength: Moral, Technical and Physical strength
DISC
Assertiveness
Communication
Technics in Communication
Questioning
The deep Motivations
Different types of questions
Listening, Silence, Objections, Body Language
Discover the different services and products
How to discover the real needs and opportunities of the customers
KYC – Know Your Customer
Technics in Sales
The art of concluding in ten points
Q&A

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 😊

REGISTRATION

Send your filled registration forms via email at KBA, or contact us at:
kbatrainingcenter@bankassoc-kos.com or **038 246 171**