Successful Sales

ICMA Executive Education Skills Course
Training Programme

The ‘Successful sales’ training programme focuses on instilling sales skills for selling international debt, equity and derivative instruments to an institutional client base. It aims to develop in participants market-leading client acquisition and retention skills.

The course is a fast-track programme covering both core telephone selling skills and client meeting skills. The programme is highly interactive and key skills learning will be supported by syndicate work and role-plays for all participants. (Because of this numbers for each course are strictly limited). ‘Successful Sales’ also examines the inter-relationship and interdependency between sales people and traders, which is unique to the Capital Markets environment, but key to delivering profitable outcomes. While promoting cutting-edge sales skills the programme is firmly grounded on the core principles of integrity in the workplace and treating customers fairly.

Who should attend?

All those involved, or looking to become involved, in a sales and /or marketing capacity in the financial markets. The course is also beneficial to traders in developing an insight into client behaviour, and an understanding of the sales process.

Course Programme

Day One

Session 1. Introductions

• Skills to acquire

• Problems to solve

Session 2. Selling or buying?

• Push vs. Pull sales

• The 'Buying Process'

• Mis-selling

Session 3. Know yourself

• The Competitive Challenge- what can you deliver?

• SWOT Analysis

• The Belief System

Session 4. Know your client

• Prospects, clients, advocates

• Forensic research

• Setting objectives and planning outcomes

• Advance vs. continuation

• Relationship vs. Transaction

Session 5. New Client Development

- Cold calls
- Write, phone, write
- Gaining the appointment
- Planning the face to face meeting

Session 6. The telephone call

- The limitations of the telephone
- Pre call planning – setting objectives
- Case study preparation – GAP analysis and team discussion
- What to ask?
- The structure of the call – an established model structure

Session 7. Role Play One – the phone call

Participants will undertake telephone role-plays based on detailed 'real life' capital market investor / sales case studies. These will be recorded and critically appraised by the group

- Evaluating the call

Session 8. Sales Skills Development

- The persuasion process
- Research questions
- The counselling phase
- Motivating action
- Gaining commitment

Session 9. Role Play Two

Participants will undertake sales / investor role-plays using newly acquired techniques. These will be recorded and critically appraised by the group.

•Evaluation of role-plays

Day Two

Session 9. Role Play Two (cont'd)

Session 10. Client Proposals & Effective Written Presentations

- Handling RFPs
- Identifying specific needs and expectations
- Developing clear aims and objectives
- Structuring the proposal
- Avoiding the pitfalls
- Using Microsoft Powerpoint

Session 11. The Client Presentation (the 'Beauty Parade')

- Detailed planning
- Developing content -Identify the audience
  -Identify the message

There will be a key role-playing exercise in which all participants will deliver a proposal to a major investor. All presentations will be videoed and critically assessed by the group

- Listening, flexibility and spontaneity
- Language skills – written vs. Spoken
- Verbal delivery skills
- Non-verbal delivery skills

Session 12. The Client Response

- Handling questions
- Handling objections

Session 13. Summary & Action Point

Faculty

Chris O'Malley is an economics graduate with more than 30 years experience in the international debt markets entirely on the sales and origination side of the business. For 12 years he managed sales teams: firstly heading the London sales team for Credit Suisse First Boston and then managing sales globally for Samuel Montagu, Midland Montagu and subsequently HSBC. He has worked closely with sales teams in London, New York, Tokyo and Hong Kong and has extensive experience and knowledge of the needs and behaviour of international investors For HSBC he then transferred to the origination desk establishing a new issue business for the Middle East, India and Africa, successfully bringing many new issues to the loan and bond markets. Chris is a consultant to the International Capital Market Association focussing on training and market practice. He has developed and is Course Director of the ICMA Primary Market Certificate programme and Head of Faculty for ICMA Skills. Chris has a very focussed yet interactive training style and a depth of experience that allows participants to gain knowledge through his well-constructed, practical case studies and pragmatic approach to the role.

Contact us

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