How do we equip the Premium Executive team based in Hong Kong, to deepen Client engagement and thus build Client Relationships? Pilot test the learning and experience in Hong Kong to cascade across other APAC countries.

The Client: Multi National Bank, setting up a new team, to connect to a new High net-worth client segment

Target Audience: Entire Premium Executive Team and Supervisor based in Hong Kong

Brief: The new Premium Executive team to engage with existing clients to deepen relationship and also proactively connect on specific campaigns and referrals to clients. Program to be delivered in Cantonese.

The Need: The intervention was part of the Induction program for the team with the intent to minimize their learning curve and offer increased value and benefits to clients.

- How to gain confidence in client interactions
- How to build rapport with clients and earn trust and respect
- What is the significance and impact of word and voice in an interaction
- How to ask the right questions and know the client's needs
- How to frame your features and benefits of the offer to meet the needs
- How to handle objections effectively
- How to become a successful sales executive
- How to effectively manage your sales activities and Portfolio

What We Did:

Always – Client First

- Understood the Bank's products, features and benefits to create realistic product pitches
- Studied the quality parameters to ensure that sales conversations met the stringent guidelines
- Listened to real customer calls of other teams to understand possible selling opportunities, customer preferences and styles
- Discussions with key stake holders to understand products, team goals, metrics, systems and processes to create practical selling scenarios

The Intervention: A two-day sales program

- Understanding basics of selling
- Importance of Word and Voice: Significance and impact
- Knowing the client's needs: Probing
- Explaining product Features & Benefits to client
- Answering Client's objections
- Closure
- Portfolio Management

The Game Changers:

- Use of real call-clipping as examples of sales opportunities
- Team Charter: List of Do's and Don'ts prepared by team - shared with seniors as a tracker
- Prepare own Tool Kit - end of every module create an instantly usable script based on techniques learnt, practiced and mastered.
- Module on Portfolio Management
- Real-time Simulation and enhanced Role plays to profile the distinct role of the Premium Executive
- A Straw-man: Building a Premium Executive persona that runs through the program

The Results:

- The Program was very well appreciated and earned us a lot of respect from our participants because they found answers to what they were seeking
- The Premium Executives felt ready, equipped with techniques & confident
- 3 Key Team Takeaway's:

    1. Sale begins before the actual sale.
    2. Hired to build trusted relationships
    3. All impressions are only over phone