The Business of Financial Services
Program Description

This Level 200 program is designed to build on the Level 1: Fundamentals of Financial Services Industry course and provides your sales professionals with an understanding of the business drivers creating the opportunities for today's solution providers. Understanding the business issues your clients are confronted with is the first step in positioning your solution. Oriented to assist in defining the opportunity and differentiating your sales and support teams, The Business of Financial Services, delivers the necessary insight and thought process.

For each individual industry segment, we will:

- Identify the relevant industry trends, business issues and challenges creating the Opportunity
- Describe the organizational structure of financial institutions
- Determine key decision-makers to target and their perceived "values"
- Craft "Bright" questions to ask for gathering information, qualifying a prospect and creating interest
- Discuss the "business" of the specific industry segments (e.g., products, delivery channels, risk management, sources of profitability etc.)

Understanding the business issues your clients are dealing with is the first step in positioning your solution…

Asking the right questions is the next step in defining the opportunity and evidencing your understanding and value in proposing the appropriate solution.

- Understand the sales implications of financial reports, key business ratios and efficiency metrics
- Explain the key business drivers creating opportunities and the implications of these business drivers on the use of IT solutions
- Describe the key business processes and information flows within the various industry segments

This course is targeted at Sales, Consulting, Marketing and Support professionals who have a fundamental understanding of the Financial Services Industry.

LEVEL 200 COURSE TOPICS INCLUDE:

BANKING:

- Retail Banking Overview
- Branch Operations
- Consumer Lending
- Delivery Channels
- Wealth and Relationship Management
- Payments Overview
- Consumer Payments
- Wholesale Payments
- Corporate Finance
- Treasury Management Services
- Core Banking
- Risk and Compliance Management
- Using Financial Information to Sell

CAPITAL MARKETS:

- Capital Markets Overview
- Retail Brokerage
- Wealth and Relationship Management
- Investment Banking
- Trading and Institutional Brokerage
- Custody
- Clearing and Settlement
- Exchanges and Execution Sources
- Straight Through Processing (STP)
- Risk and Compliance Management
- Using Financial Information to Sell

INSURANCE:

- Life Insurance Overview
- Life Insurance Distribution
- Life Insurance Underwriting
- Life Insurance Wealth and Relationship Management
- Non-Life Insurance Overview
- Non-Life Insurance Personal Insurance
- Non-Life Insurance Commercial Insurance
- Non-Life Insurance Underwriting
- Using Financial Information to Sell
- Risk and Compliance Management

1.866.468.6774 http://www.goto-psi.com