



## OPPORTUNITIES AND SOLUTIONS IN FINANCIAL SERVICES PROGRAM DESCRIPTION

This tactically oriented training builds on the knowledge gained in Level 100: Fundamentals and Level 200: Business of Financial Services. Customized to reflect *your company's specific solutions*, Opportunities and Solutions in Financial Services provides your professionals with the knowledge needed to identify, qualify and pursue specific opportunities in the Financial Services Industry. The course focuses on those opportunities where you have a viable solution to offer.

For each individual Opportunity and applicable Solution, we will:

- Identify the relevant industry trends, business issues and challenges creating the Opportunity
- Identify the benefits of your Solution(s) to the Opportunity presented
- Link the opportunities with the client specific solution(s)
- Discuss techniques for using client/industry information to initiate sales planning
- Determine key decision-makers to target and their “hot buttons”
- Craft “Bright” questions to ask for gathering information, qualifying a prospect and creating interest
- Profile success stories detailing your company’s success in selling and delivering the Solution

This tactically oriented course provides the linkage for identifying, qualifying and pursuing opportunities where your company has viable solutions to offer.

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