MASTERING THE FINANCIAL SERVICES INDUSTRY

PROGRAM DESCRIPTION

The *Mastering the Financial Services Industry* program is custom designed for each client. The following description is based on our experience however we will define the deliverable based on client specific objectives.

Mastering the Financial Services Industry provides a select group of individuals with the opportunity to demonstrate their ability to position their solutions and their company effectively in a solution selling environment with senior level management. The session will serve to further challenge and assess each individual's personal development as a basis for improving his or her effectiveness.

Participate selection is based the client's selection criteria and should include successful completion of the *Financial Services Industry Training Curriculum* or equivalent level of experience.

Built around a comprehensive case study that will incorporate opportunities within several lines-of-business, *Mastering the Financial Services Industry* provides a basis for evaluating participants' ability to:

- Assimilate client specific information within the context of their broader knowledge of the financial services industry (acquired through the *Financial Services Industry Training Curriculum*)
- Analyze the information within the context of the client's specific solutions
- Respond and react to "hot off the press" internal memos or press releases (i.e., the bank you are calling on announces it is acquiring another bank or the CFO announces a new focus on performance ratings)

- Develop and deliver a successful solution approach to the customer's business problem/pain
- Position their solution as the most viable solution/partner

The case study will serve as a launching pad to direct participants to conduct detailed analyses of client information and engage in several exercises designed to test their ability to use what they have learned as a process to identify opportunities and propose solutions.

The session will conclude with a formal presentation to a Board of Managers of the fictional case study financial institution. This Board will be made up of actual industry executives, selected by the regional financial services management team, augmented by both client and PSI representatives. Based on the results of the formal Board presentations and the case study exercises participants will be evaluated and graded, receiving accreditation for successfully completing the *Mastering the Financial Services Industry* course.

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