



MARKETING SUPPORT SERVICES

PSI is More Than Your Training Partner... in addition to developing and delivering comprehensive, high impact financial services training, we have proven expertise in internal and external communications. We also have a clear understanding of your business goals and target accounts.

At PSI we work with our clients to leverage or repurpose their training assets and investments through various sales and marketing support applications including:

- Participating in sales events
- Providing account assessment activities for validating sales strategies
- Training partners, VARs and internal and external distribution channels
- Utilizing portions or all of training materials to supplement sales support and collateral documents and tools
- Facilitating user group sessions where training is reoriented to the customer's perspective

SAMPLE MARKETING SUPPORT SERVICES

Industry Sales Competency Standards that identify the value your customers and prospects place on the various sales competencies required to sell into today's financial services industry, including sales skills, product/service knowledge and industry knowledge.

“State of the Industry” Presentations that allow you to evidence your company's credibility in financial services and elevate your account relationships. Developed and/or delivered by PSI, these presentations are tailored to reflect your specific objectives.



Applications include:

- Individual client or prospect deliveries
- User groups
- Associations/conferences
- Executives (internal or external)

Industry Sales Guides provide your professionals with the support “road map” they need to successfully sell into the financial services industry. PSI has developed sales guides that include an industry overview and linkages to supportive resources including: applicable training with migration paths, account planning and strategy tips, information resources, research, press releases, proposal templates and specific solutions your professionals can consider offering. PSI’s sales guides are the perfect addition to help transition the sales force from the classroom to the boardroom and help support success in the field.

Customer Education Programs are financial services educational programs you can offer to your clients, strengthening your client relationships and enhancing the market’s perception of your company as a leader in industry education. These programs are developed and/or delivered by PSI professionals.

White Papers provide a vehicle for you to demonstrate your company’s in-depth understanding of the issues and strategies driving the financial services industry. White papers serve as an informative “non-sales” marketing piece that support your marketing strategies and sales motions, while providing a basis for competitive differentiation. White papers can also be used for internal training applications.

Case Studies enhance your market position, image, and credibility by evidencing your success with specific solutions. Delivered through objective, informative documents, Case studies highlight your solutions by providing in-depth profiles of key implementations and competitors. Case studies can also be used for internal training applications.

Sales Presentation Development Services range from our review, commentary and modification of your existing sales presentation templates... to the ground-up-development of a complete sales presentation series to ensure high-impact sales presentations.