



iPi Global Financial Services Academy



Bancassurance Prospectus

March 2022

Conversational Selling



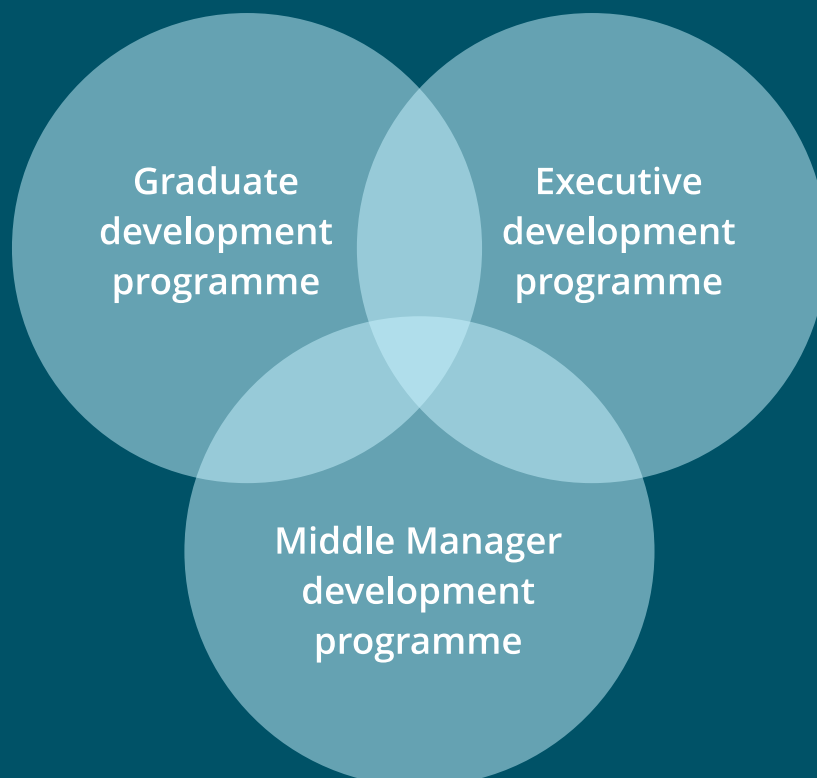
iPi Global Solutions - creators of conversational selling for Bancassurance

Our mission

At the iPi Global Financial Services Academy, our mission is to educate Insurance management and staff as well as those of their Banking partners, to create expert Sales Leaders and salespeople who through the quality and professionalism of their actions will be instantly recognised as Graduates of the iPi Global Financial Services Academy.

Our award-winning programmes are designed to demonstrate our commitment to enabling clients achieve outstanding results. We want to help people achieve their true potential and beyond, and who will go on to make a difference in the world. Our Programmes are designed to change people, who in turn go on to change the lives of those around them. Whatever the sales role, Graduates of the Academy will be fully equipped to achieve success.

Our Modular approach to training and development is flexible and allows for specific programmes to be created using any combination of the numerous modules. This has allowed the iPi Global Financial Services Academy to offer three Management Development Programmes to support 'up and coming' leaders to acquire new skills and practices. The modules selected with the client to ensure programs are truly relevant to the organisations' needs.



The learning programmes

Introduction

The Academy Training Solutions have been developed after a rigorous study of the needs of Bancassurance staff in a modern and dynamic working environment. This is the culmination of over 30 years of study and research to develop not only the world's best Bancassurance businesses but also the training and coaching that is needed to support these. These studies commenced in 1989 and continue to this day.

As a result, the Academy offers a full and flexible range of training solutions that covers the entire needs of the following learner populations or learner groups:

- ▣ Personal bankers
- ▣ Financial advisors & insurance specialists
- ▣ Sales team leaders
- ▣ Bancassurance heads
- ▣ Bancassurance trainers
- ▣ Bank partner sales managers
- ▣ Bank partner branch managers
- ▣ Bank partner supervisors
- ▣ Bank partner tellers
- ▣ Bank partner lead generators
- ▣ Bank partner front line sales staff
- ▣ Bank partner financial advisors
- ▣ Bank partner financial planners
- ▣ Bank partner trainers
- ▣ Management development candidates – both insurance and bank partner
- ▣ Senior management – both insurance and bank partner
- ▣ General management – both insurance and bank partner
- ▣ All staff who recruit newcomers to their organisation in a sales role
- ▣ All staff who undertake assessment centres for managers and salespeople



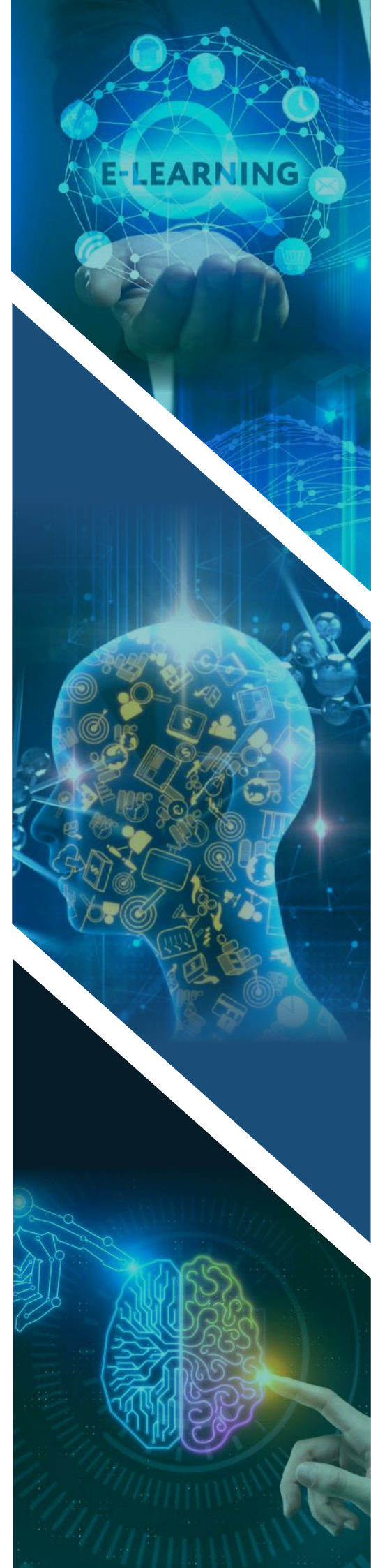
Learning methodologies

Training comprises of knowledge transfer and skills development. COVID-19 has changed the way that people are developed. It was not possible to continue to deliver training in crowded classrooms and so iPi developed Blended Learning Pathways for learners that allows a mix of animation, gamification, E-Learning, videos, virtual meeting rooms and assessments. This is supported by an agile Learning Management System and our own proprietary Learning Experience Platform. Learners can study using their smart phone, laptop, tablet or desktop and the real advantage of this is that unlike classroom training, which is a one-hit opportunity, they can study over and over again. As the training is cascaded throughout an organization, there is no dilution of key learning and messages as everyone receives exactly the same content. We also provide a classroom version of all the training as we move into the post COVID-19 world.

Skills development must take place using experienced trainers who can spend time coaching, developing and counseling learners in an environment where observation and learning is abundant. The validation of skills is often overlooked and so the iPi Global Financial Services Academy has introduced Assessment Centers to ensure that learners can demonstrate their ability in a lifelike environment. This can be virtual or 'face to face'.

At each Assessment Centre, learners will be graded according to their demonstrated ability. These grades are as follows:

- 1 Needs significant development
- 2 Could benefit from development
- 3 Capable and effective (i.e. competent)
- 4 Role model



Blended learning pathways

Case studies

Case Studies are an important part of the iPi Global Financial Services Academy Learning Pathways. Themes are followed to allow learners to see how events and people's lives develop, and it allows them to learn how to handle people as they develop in different ways.

For example, in the Sales Leadership Programmes, learners take control of a Sales Team and learn how to evaluate the activity and performance of each member. This is achieved using Management Information analysis, team meetings, coaching, feedback and counseling methodologies.

Sales Leaders have to deal with colleagues facing different issues, from personal and family problems through to work related motivational problems. The Sales Leaders are taught how to handle each situation, develop and coach their staff and ultimately achieve the performance levels required. Humour is mixed with serious learning to make sure that the learning experience is fun and motivational.



Train the trainer

We believe in bringing skills into our client's business providing the opportunity to allow the training content to blend with the culture. In time it becomes "the way we do things around here".

We train the client's trainers to guide learners through their programme and they can provide coaching support afterwards. The trainers are accredited and, in our experience, many go on to achieve senior sales related positions within the organization.

So often businesses make the mistake of using successful salespeople to train others, where in fact the competencies required to be a good training facilitator may be missing. Even worse, in Bancassurance, Agency trainers are often used, whereas the Bancassurance salesperson is a "Farmer" by nature, rather than a "Hunter" like an Agent. This is a costly mismatch of talents.

In the same way, trying to convert Agency training to become Bancassurance training results in a programme that is at best irrelevant, and at worst destructive as good Bancassurance skills are eroded. The iPi Global Financial Services Academy can help clients to identify the most suitable trainers from their employees and then give them the necessary skills to facilitate to very high standards.

Our own trainers are hand-picked and selected from the best in the industry. Before they are allowed to train learners, they have to complete a rigorous training programme where they themselves have to pass a stringent Assessment Centre Test. Once accredited, they can train the modules for which they are deemed fully competent to facilitate. The trainers themselves undergo constant re-assessment to ensure that their skills and motivation remain at the highest levels.



Management development programmes

The selection of courses and modules is extensive and far reaching which has allowed the iPi Global Financial Services Academy to introduce Management Development Programmes using a “pick and mix” modular formula. Depending upon the needs of the business and its staff, modules can be selected and combined to create a purpose-made Development Programme.

After a far reaching study of the activities of Bancassurance Sales Managers (both from the Bank and the Insurer) the iPi Global Financial Services Academy identified several areas where training has never been designed and the staff were effectively “making it up as they went along”. The iPi Global Financial Services Academy has now created modules covering all these additional skills and offer these as an Advanced Sales leadership Programme.





Blended learning pathways

Sales and leadership programmes

The iPi Global Financial Services Academy offers the following selection of Classroom based and Digitally enhanced Blended Learning Pathways. The pure Bancassurance Sales and Leadership Workshops are covered in detail in the following pages.

- Conversational selling workshop 1 – lead generation skills
- Conversational selling workshop 2 – conversational selling skills
- Conversational selling workshop 3 – lead management
- Conversational selling workshop 4 – helping the customer to buy
- Sales leadership workshop 1 – activity & productivity management
- Sales leadership workshop 2 – performance management
- Sales leadership workshop 3 – team development
- Sales leadership workshop 4 – peak performance
- Advanced sales leadership programme – the extra mile
- Bancassurance assessment centre – assessor training
- Assessment centre facilitation – assessment facilitation
- Train the trainer programme – all modules

Awards and accreditations

At the end of each Programme or Workshop, we recommend that successful learners receive certificates that count as part of the way towards completion of their individual Learning Pathway. At the end of each Learning Pathway, the learner will hopefully graduate from the iPi Global Financial Services Academy with full honours and will be awarded a Diploma and a memento to celebrate their success.

All the modules are UK CPD accredited and earn UK CPD points for the learner.

Along the way there can be regular awards for various candidates e.g. "The Most Improved Performer" or "Top Performer" as rated by the trainers as well as through sales performance improvement. End of Course dinners can be a regular feature where senior management are invited as Guests of Honour.

The highest accolade of all is to become a "Role Model". This can be awarded to successful learners who at the end of their training have achieved a 500% improvement in sales performance. They proudly sport a badge that acknowledges this significant achievement.

Finally, the Role Models can become lifetime members of the iPi Global Financial Services Academy Hall of Fame. This is open to Bank Partner staff as well as Insurance staff.





iPi Global Financial Services Academy



Sales Skills for Bancassurers

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Lead generation skills

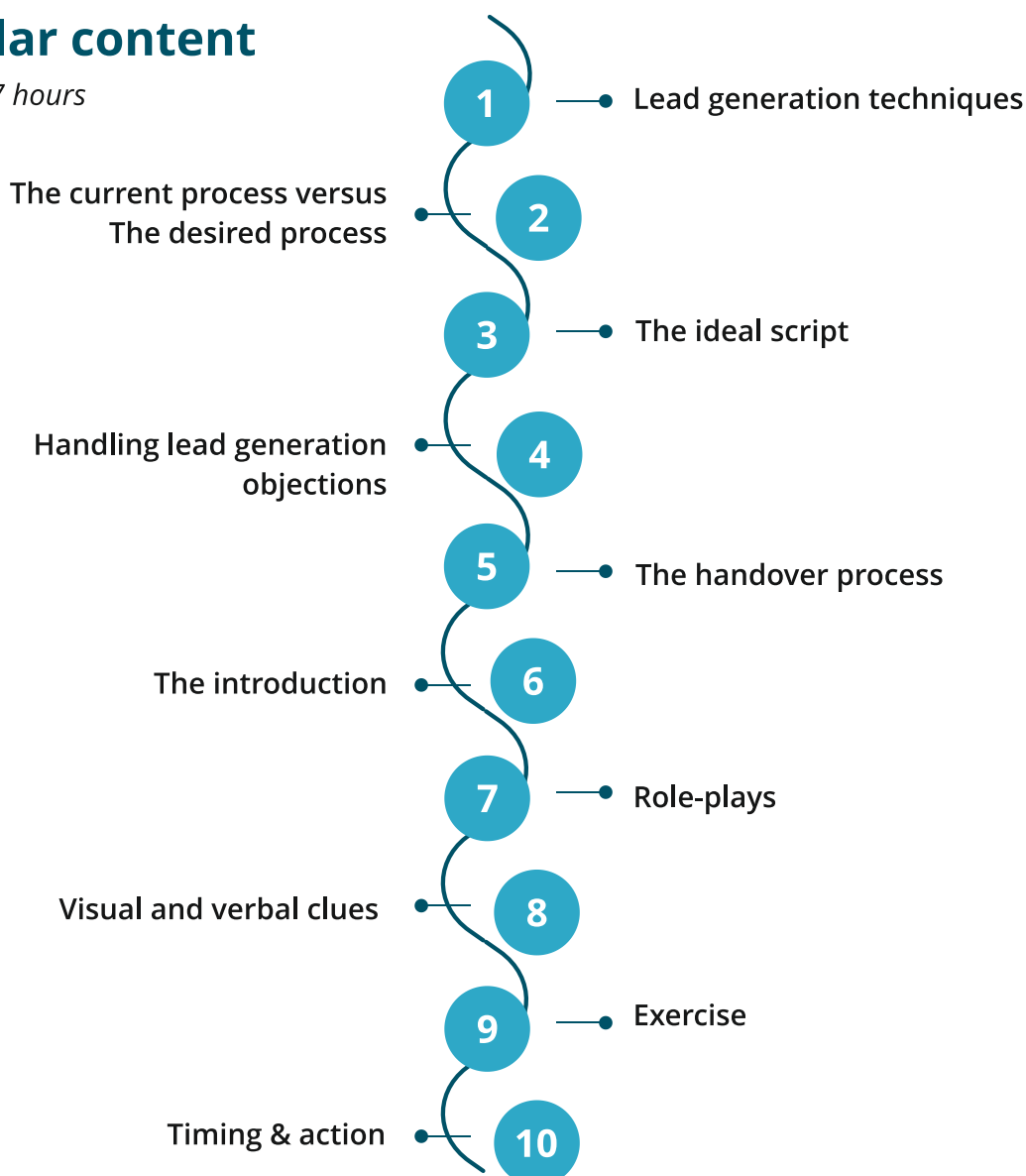
Objective: To ensure all staff involved in generating leads understand how to converse in a way that creates high quality and easily convertible leads.

Who is it for?

Designed for both Bank Partner and Insurance Lead Generators, this could in fact include everyone in the Bank branch. This course is designed to give new skills that see leads being generated without mentioning Insurance or products. It is pure needs-based and has been proven to treble lead numbers.

Modular content

Duration: 7 hours



Conversational selling skills

Objective: To ensure all staff involved in selling banking or insurance products are competent at using conversational selling skills to achieve high conversion rates and greatly improved productivity.

Who is it for?

Designed for both Bank Partner and Insurance salespeople who undertake interviews with customers. The easiest way to identify the correct populations is to apply the criteria "if you sell a banking or insurance product to a customer" then this is a course that they need to attend. Conversational selling has generated amazing results with salespeople usually experiencing an increase in productivity of 300%+ with immediate effect. There is a much greater focus on health, medical and protection needs.

Modular content

Duration: 7 hours

- 1 Introducing conversational selling
- 2 Key and chat questions
- 3 Linking between the 4 focus areas
- 4 Focus upon health, medical and protection
- 5 Closing without mentioning a product
- 6 Financial needs analysis
- 7 Closing skills



Lead management

Objective: To ensure all sales staff are able to motivate and support their lead generators to ensure a constant supply of high quality leads.

Who is it for?

Designed for the same population as Workshop 2, this Workshop focuses on the need to keep a solid pipeline of leads in the simple belief that “Leads are the fuel that drives the sales engine”. This focuses upon how the salesperson interacts with the Lead Generators, and how to keep them motivated, alert, skilled and effective.

Modular content

Duration: 7 hours

- Introduction to lead management
- Showing a genuine interest in staff
- Sustaining quality leads
- Giving first class feedback
- Effective coaching
- Motivate by giving praise
- Key performance indicators



Helping customers to buy

Objective: To help successful salespeople to develop advanced skills that enables them to help customers to make their buying decisions.

Who is it for?

Designed for the same population as Workshops 2 and 3, this Workshop focuses on advanced selling skills focusing upon listening and active listening skills, helping the customer to a decision, closing and then exceeding service and delivery expectations. This is an opportunity to identify areas where revision training can be given as additional modules.

Modular content

Duration: 7 hours

- 1 Bob the builder - the construction challenge
- 2 Active listening
- 3 Influencing the customers to buy
- 4 Trial closes and closes
- 5 Exceeding the customer's service expectations





iPi Global Financial Services Academy



New for 2022

March 2022

Conversational Selling



10 steps to success

Objective: To provide salespeople with the skills to deliver an advanced sales process and thereby increase their professionalism and sales performance.

Who is it for?

Designed for Bancassurance Financial Advisors, Insurance Specialists and Business Development Managers – this new programme brings together the best of the best and some new modules making it our most comprehensive sales skills programme ever.

Modular content

Duration: Module specific

- How well do you really know your customers?
- Conversational selling
- Hard & soft facts + four key questions & linking
- Insurance protection
- Insurance product knowledge
- Gaining trust & exceeding customer expectations
- Influencing people
- The sales funnel
- Customer contact calls & what you need to know
- Financial needs analysis and unparking
- Uncovering financial needs
- Gaining commitment to action
- Presenting the solution benefits
- Trial closes & overcoming objections
- Understanding personal sales process strengths & weaknesses





iPi Global Financial Services Academy



Sales Leadership Skills for Bancassurers

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Activity & productivity management

Objective: To ensure all Sales Managers are able to lead their sales teams through a thorough knowledge of activity and productivity levels and the actions to take to fully understand the inputs and the outputs.

Who is it for?

Designed for any Sales Manager who runs a Sales Team and wants to become more than just a Manager, and who aspires to become a dynamic and effective Leader of people. This Workshop gives Managers an insight into how to understand sales metrics and then make the right decisions about how to act upon this information. It helps them to learn how to analyse the effectiveness of their salespeople in each stage of the sales process and goes on to teach a few new techniques in the best practices of leading people.

Modular content

Duration: 7 hours



Performance management

Objective: To ensure all Sales Managers are able to manage both good and poor performers using sales leadership techniques, tools and practices to raise performance of the team to optimal levels.

Who is it for?

Designed for any Sales Manager who manages salespeople and wants to enhance the personal performance as well as the career aspirations of their people. During the workshop, the learners follow a Sales Team and manage good and poor performers through feedback and coaching skills. They also get the opportunity to prioritise their work-related activities and get “organised” to maximise their time at work. Finally they are taught several Performance Management Tools to enhance their capabilities as a Leader.

Modular content

Duration: 7 hours

- 1 | The difference between sales management and sales leadership
- 2 | Performance management – an introduction
- 3 | Bancassurance work week activity
- 4 | Giving first class feedback
- 5 | Effective coaching
- 6 | Performance management tools



Team development

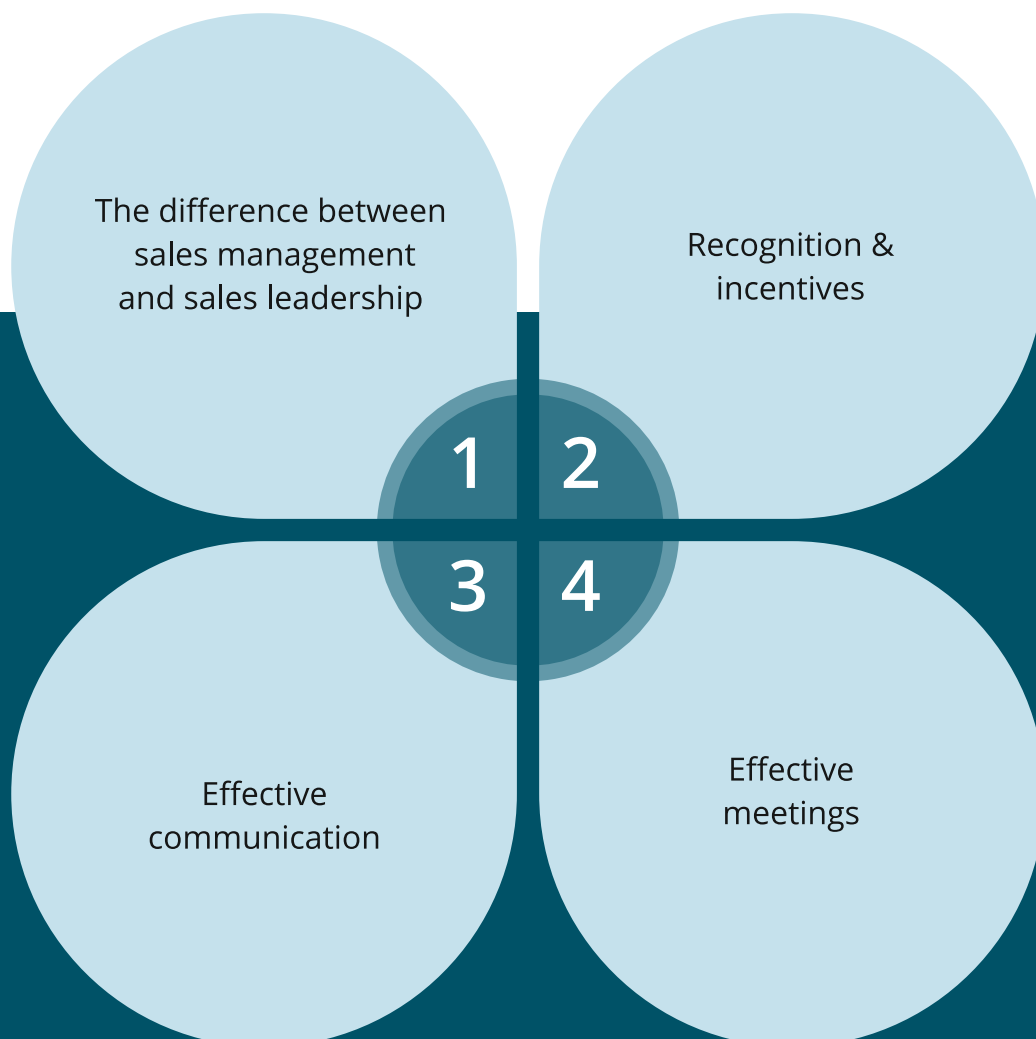
Objective: To ensure all Sales Managers are skilled in giving feedback, delivering effective coaching and perform highly as Team Leaders in the way they communicate to the Team and manage Sales Team Meetings.

Who is it for?

Designed for any Sales Manager who manages a Sales Team. The workshop focuses on the key areas of recognising good individual and team performances as well as good communications within the team and how to be effective in meetings.

Modular content

Duration: Module specific



Peak performance

Objective: To equip Sales Leaders to think more strategically as they move up the management ladder.

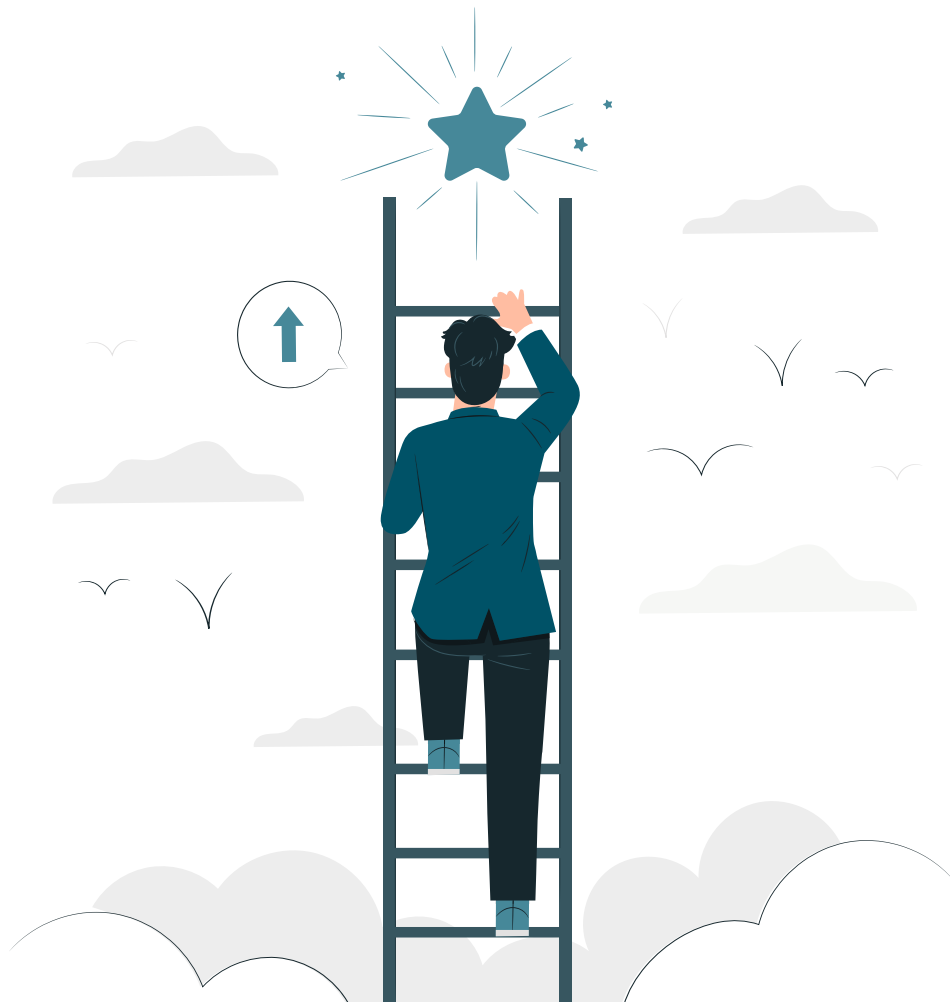
Who is it for?

Designed for any Sales Manager who maybe is moving towards a bigger role and needs to be more strategic. This is equally as valuable for any Manager currently running a Sales Team. There is a heavy focus on developing a team Vision, Mission, Values and Goals with an emphasis of how to determine the actual actions needed to make these come alive. It covers how to set effective goals for the team and how to manage in an ever-changing environment. Finally, we work with the learners to get them to realise the importance of developing networks and relationships and how to do this effectively.

Modular content

Duration: 7 hours

- 1 Vision and leadership
- 2 Vision, mission, values and goals
- 3 Team goals for peak performance
- 4 Managing change
- 5 Network and relationship development



The extra mile (1)

To skill Sales Leaders to over deliver on the expectations of senior management in the unique activities that are truly Bancassurance.

Who is it for?

Designed for any Sales Manager who manages in an environment that requires them to conduct unique and Bancassurance specific activities. It also gives additional skills needed by managers as their career progresses and they move into more strategic roles. The additional modules include those specific to operating in a virtual environment.

Modular content

Duration: Modular specific

- Asking great questions around mis
 - Planning & delivering daily sales planning & review calls
 - Planning & delivering 1:1 review & planning meetings
 - Developing motivational individual & team incentives
 - Assessing FA's knowledge
 - Training delivery skills
 - Conducting role-plays
 - On-boarding your new FA
 - Optimising joint calls & observing activities
 - Branch mapping
 - Branch integration
 - Optimising the bank relationship
- 

The extra mile (2)

Objective: To skill Sales Leaders to over deliver on the expectations of senior management in the unique activities that are truly Bancassurance.

Who is it for?

Designed for any Sales Manager who manages in an environment that requires them to conduct unique and Bancassurance specific activities. It also gives additional skills needed by managers as their career progresses and they move into more strategic roles. The additional modules include those specific to operating in a virtual environment.

Modular content

Duration: Module specific

- Building a pipeline of potential financial advisors
- Delivering effective assessments
- Developing front line staff & lead generators
- Planning & executing an events diary
- Tele-appointing skills
- Customer reviews, up-selling and cross-selling
- Identifying bank sale opportunities and making back-referrals
- Strategic thinking & planning
- Developing a business case
- Introduction to project management
- Budget setting & management
- Planning sales initiatives & marketing campaigns

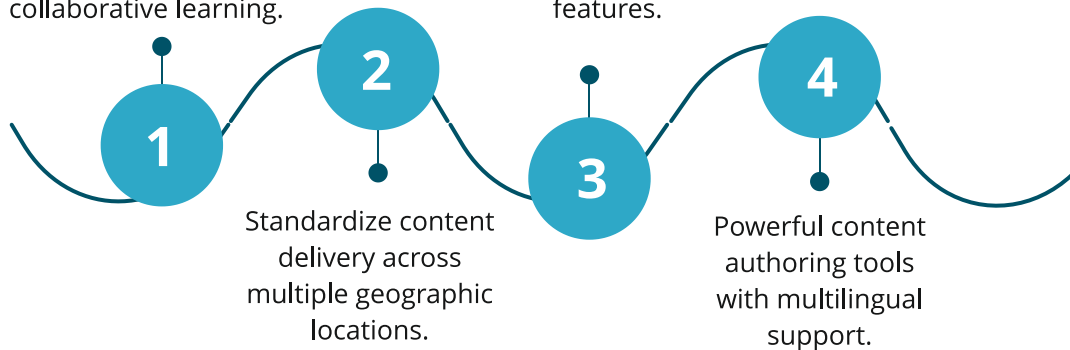


iPi Global Learning LXP

A world-class Learning Experience Platform (LXP) designed to engage learners and empower corporates with business intelligence.

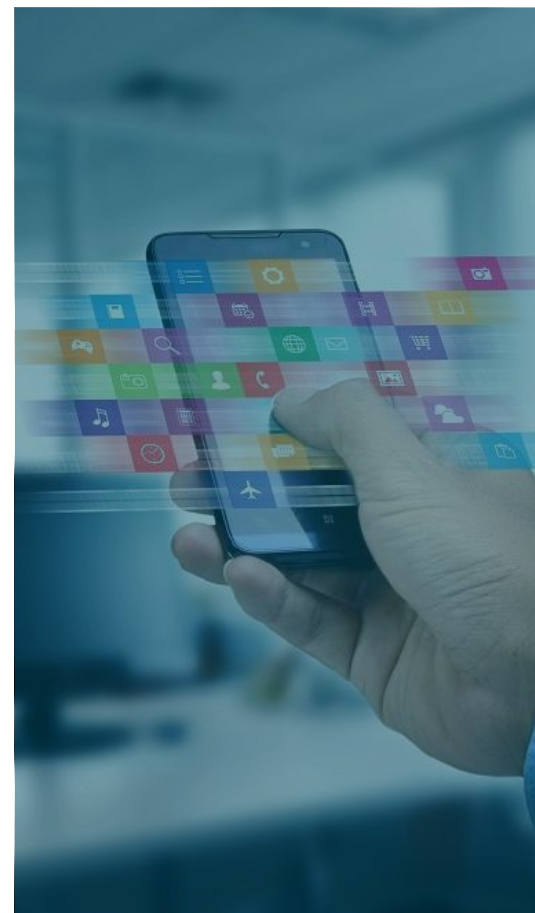
Unique learning experience system architecture which supports gamification to encourage collaborative learning.

Learning journey mapping and engagement through data analytics features.



Mobile apps

Personalised apps for just-in-time learning.



Managed services

While it is easy to use the iPi Global Learning Experience Platform, sometimes you need a simple and hassle-free solution. iPi Global Learning handles the complete management of the platform. We offer managed solutions through our customer experience desk to handle activities such as course management, user management, onboarding users, reporting and maintenance for our clients.



Course Management

iPi Global Learning Content Studio will handle all course-related requests like course creation, uploads and translation for the platform. The team will create assessment tests, certificates and keep track of learner's progress on the Learning Experience Platform.



User Management

Onboarding a large batch of learners is always a challenge. With iPi Global Learning experts on your side, you don't have to worry at all. We onboard new learners quickly and easily on the platform. All we need is the email addresses of the learners.



Service and Maintenance

The team at iPi Global Learning will manage UI improvements and fix software bugs. We'll address client requirements and will keep software in top-notch condition.



Reporting

iPi Global Learning CX executives can keep track of the system users and create monthly reports for the clients. If required, they can provide business insights.



White Label Solutions

When you choose our white-label services, iPi Global Learning goes above and beyond the standard expectations for installing and configuring the iPi Global Learning Experience Platform for you. You can sit back and relax as our tech experts take care of everything.

Users of our classroom content





Contact us

Become a part of our like minded community at IPI Global Solutions
Reach out to us to know more about our platform, services and processes.

Address:

45 Pall Mall, London, UK, SW1Y 5JG

Email : info@ipiglobalsolutions.com **Mobile number :** +44 (0) 7725 831 182



www.ipiglobalsolutions.com