

TRANSFORM's Financial Adviser Development programs are designed to help Advisers secure more appointments, convert more opportunities and build long term, sustainable success.

Our programs focus on the practical skills required to succeed in today's highly competitive financial services environment.

Addressing real world situations Advisers face, they learn practical strategies and techniques they can apply immediately.

Programs can be delivered as standalone workshops or incorporated into wider Adviser development journeys.

Pre-program selling style assessments and post-program reinforcement can be provided where required.

Singapore based since 2008, TRANSFORM are Insurance sector specialists and work internationally.

CONTACT

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FINANCIAL ADVISER DEVELOPMENT

FULL DAY PROGRAMS

Building A Sustainable Pipeline

Generating a consistent flow of opportunities through prospecting, networking and social media.

Conducting Effective Customer Conversations

Building trust, uncovering needs and creating meaningful client engagement.

Presenting Recommendations That Motivate Action

Helping clients understand recommendations and see value in taking action.

Overcoming Objections & Gaining Commitment

Addressing concerns confidently and helping clients move forward.

Building Long Term Customer Relationships

Retaining clients, generating referrals and increasing lifetime value.

BRIEFINGS (45 - 90 MINUTES)

- Generating Referrals and Business from Existing Clients
- How Top Advisers Build Their Pipeline
- Building Trust Quickly
- Asking Better Questions
- Handling Objections with Confidence
- Closing Without Pressure

ADVISER PERFORMANCE COACHING

Individual coaching can be provided to support Advisers in applying new skills, overcoming challenges and improving results.

Sessions focus on the Adviser's specific goals, opportunities and development areas.

Typically delivered over a series of sessions, personal coaching provides the opportunity to discuss real situations and challenges, explore options and receive practical guidance and support.