

# Consultative Selling for Banking Services

Sales, Marketing, and Customer Care



9194



In-Class



8 hours



EGP 2,790

## Course Description:

This program enables marketing professionals, business leaders, and decision-makers to analyze markets, craft growth strategies, and translate insights into actionable marketing plans through strategic frameworks, digital alignment, fostering stronger competitive positioning and long-term value creation

## Target Audience:

- Retail bankers and relationship managers.
- Branch sales officers and customer service officers.
- Direct Sales & Tele sales agent.
- Any banking professional involved in direct customer interaction and cross selling.

## Course objectives:

**By the end of the course, participants will be able to:**

- Understand the principles of consultative selling and its application in banking.
- Identify customer needs through effective questioning and active listening.
- Discuss financial solutions aligned with customers' life goals and financial plans.
- Recognize how to build stronger client relationships that lead to loyalty and retention.

## Course Outline:

### Module 1: Introduction to Consultative Selling

- Difference between product selling and consultative selling
- Why consultative selling is critical in today's banking environment
- Effective questioning techniques
- Active listening skills
- Identifying explicit vs. implicit needs

### Module 2: Building Trust and Long-Term Relationships

- Establishing credibility as a banking advisor
- Creating value beyond the product
- Mapping customer needs to banking products/services
- Using storytelling and financial planning techniques

### Module 3: Handling Objections Effectively

- Common objections in retail and SME banking
- Techniques to turn objections into opportunities

### Module 4: Closing and Follow-Up

- Non-intrusive closing techniques
- Post-sale follow-up strategies to ensure retention
- Cross-selling opportunities

## Assessment Strategy:

Participants will be informally assessed based on their interaction during sessions and their participation in group exercises.

## Upon Successful Completion of this Course, participants will obtain:

N/A

## Program language:

English

## Prerequisites:

None