



# Strategic Sales & Relationship Management Programme

## What is the background to this programme?

**Momentab2b's** Strategic Account Management programme provides sales and relationship managers in the financial services industry with an approach and methodology that will enhance account relationships and increase sales.

It has been designed after years of working with and training financial services sales and relationship managers in the UK market.

**Momentab2b** has worked with companies such as Clerical Medical, Lloyds TSB Insurance, Abbey, Nationwide, BUPA, Unum, LV=, Met Life, C&G and Friends Provident.

## What does the programme provide?

The programme provides sales and relationship managers of varying experience with the opportunity to audit their approach and skills so as to establish even more effective ways of working.

Our approach covers the sales and relationship management aspects of the role ensuring a balance between partnering and profit. Specific detail is outlined below.

## What competencies and behaviours can the programme enhance?

Managing relationships	Risk management	Strategic awareness	Business planning
Account familiarisation	Sales management	Situational analysis	Commercial acumen

## What will the programme cover?

- **Sales & relationship management process** – what underpins and focuses your activity?
- **Panel segmentation** – what is the overall strategy around where you spend your time?
- **Selling to the account's buying process** – are you account centric with the customer at the heart of your strategy?
- **Creating value as the means to enhancing business relationships** – what value do you bring beyond your product?
- **Defining account strategies and acting on them** – who manages who within the relationship currently?
- **Selling yourself to yourself** – do you understand your strengths and limitations within the sales process and play to them?
- **Planning as a means to driving productivity day-to-day** – does your planning drive and enhance your performance currently?
- **Balancing relationship management with commercial reality in third party selling** – do your accounts know what you expect and need for this to be a partnership?

## Who is the programme appropriate for?

Sales and relationship managers who are responsible for:

- Managing a panel of accounts with the objective of achieving new business, retention and profitability targets in the short and long-term.
- Developing and maintaining internal and external relationships to achieve this.
- Working effectively with accounts that have a few or number of stakeholders to influence.

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## What skills can the programme cover?

- Sales skills
- Consultative selling skills
- Influencing skills
- Negotiation skills
- Analysis & planning skills

## What is momentab2b's approach to programme design?

- We base all our programmes on the reality of what sales and relationship managers have to do day-to-day.
- To this end we take the principles of our programme and mould them to your people's environment and requirements.
- However good the principles and models explained and demonstrated, if they do not translate during the programme to your people's world, they will not be applied.
- We work with all our clients to ensure the programme fits with "their world" and their desired business outcomes.

## What is momentab2b's approach to programme delivery?

- We insist that our trainers understand the market that your people operate in and will invest the time to ensure this – **credibility is a trainer's best learning tool**.
- Our style is consultative always starting where your people are so as to build on and enhance rather than appear to judge.
- We practice what we preach around consultative selling as to implement the desired skills and behaviours from the programme, your people must see value and buy it.

## What clients say about our programmes?

*"Momentab2b provided our Sales, National Account and Support teams a highly valuable programme. The feedback from the teams was unprecedented and was without exception extremely positive. The programme impacted the attendees positively from both personal and business perspectives. Well worth investing in."*

Read more about what our clients think at; [www.m-hl.com/b2b](http://www.m-hl.com/b2b)

## Who are momentab2b?

**Momentab2b** are the business to business division of Momenta Holdings a specialist financial services training and consulting business.

## What do momentab2b offer?

Bespoke and specialist training for broker sales and relationship managers who work across the financial services industry.

To find out more, call **Chris Smart** on **07770 775 541**,  
e-mail [b2b@m-hl.com](mailto:b2b@m-hl.com) or visit [www.m-hl.com/b2b](http://www.m-hl.com/b2b)

