

# Telephone junk mail or effective sales calls?

## Telephone Account Management

Telephone account management is now well established as a successful distribution channel for writing business through IFAs.

The need for telephony has been driven by the large number of smaller IFAs who cannot be cost effectively covered by traditional face-to-face Account Managers.

As providers' telephone capability grows and this sector of the IFA market becomes more competitive, the true differential to your proposition is the quality of your Telephone Account Managers.

In many instances telephony has evolved with little formal sales process or specific intermediary telephone sales skills training.

Typical Issues	Momentab2b Solution
Viewed as call centre by IFAs	Valued telephone account management service
Business received may have come anyway	Quantifiable business as a result of sales effort
Telephone becomes a barrier to business relationship	Different medium but same approach and value as face to face
Telephone Account Managers only cover 20% of panel	Segmentation strategy to cover all of panel
No clear sales process defining what good looks like	Simple and effective telephone sales process
Calls often resemble telephone junk mail	Structured calls with clear objectives
Little call listening, feedback and coaching	Developing people at heart of developing business
Telephone account managers seen as inferior to face-to-face colleagues	Telephone account managers producing more business than face-to-face colleagues
Low activity levels	Activity levels that drive increase in business

**Momentab2b** has many years experience of working in the intermediary sales telephone account management market.

What some of our customers say about us;

*"Momentab2b have worked with our telephone account managers over the last three years... Their complete understanding of our marketplace differentiates them and what they can add to what we do."*

*"They instantly communicated with our account managers because of their in-depth understanding of telephone account management."*

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

[www.m-hl.com/b2b](http://www.m-hl.com/b2b)

# momenta *b2b*

As Telephone Account Managers will have different development needs depending on their experience, we offer two levels of Telephone Account Management training – core and advanced:

## Core Programme

The core programme focuses on the key tasks of the role, and trains and embeds our tried and tested sales process.

The Momentab2b Telephone Sales Process				
Introduction	Marketplace	Criteria	Match	Close

© Momentab2b

In addition the programme introduces a telephone account management segmentation model that aligns to the sales process.

The programme is very practical and culminates in Telephone Account Managers undertaking **RealPlays**, Momentab2b's real life role plays using IFAs.

The key to RealPlay is that we use **practising IFAs** in the role of the IFA.

## Advanced Programme

The advanced programme helps Telephone Account Managers with good sales skills deal with a broader range of IFA types by becoming more aware of their own preferred style; how to identify the behavioural style and traits of their IFAs and how to best deploy and modify their natural style.

During this programme, **Momentab2b** use the **Thomas International** behavioural assessment tool to provide your Telephone Account Managers with a detailed report on their preferred style and likely behaviours together with an audit of their selling style.



## About Momentab2b

**Momentab2b** is a subsidiary of Momenta Holdings, an established Advice, Training and Business Review consultancy dedicated to the financial services industry.

Since 2002 we have been providing bespoke business consultancy and training solutions for financial services companies transacting business through intermediaries.

To find out more, call **Chris Smart** on **07770 775541**  
e-mail [b2b@m-hl.com](mailto:b2b@m-hl.com) or visit [www.m-hl.com/b2b](http://www.m-hl.com/b2b)

[www.m-hl.com/b2b](http://www.m-hl.com/b2b)

