

Are you getting the most from your top people?

Advanced Account Management

- How do you retain your top performers?
- Are they being stretched or are they in their comfort zone?
- Does Account Manager's personal development become a casualty of their own success?
- Would further investment in them reap even greater returns?
- What type of personal development should top performers receive?

In today's market it is a constant challenge to 'raise the bar' for all Account Managers, including high performers. It is important to protect and 'farm' existing IFA relationships but to increase business levels Account Managers need to be continually developing new supporting IFAs across their panels. There are often barriers to this, especially for high performers.

Sometimes a business relationship just does not work, regardless of how good your proposition is. It can be all too easy for an Account Manager to dismiss this relationship and move onto another IFA regardless of the potential – an opportunity lost for both the Account Manager and the business.

The key, is to ensure that Account Managers with good sales skills are able to deal with a broader range of IFA types and are not confined to just increasing the business they secure from existing clients.



Working in conjunction with Thomas International's behavioural assessment model, **Momenta**2b**** helps Account Managers become far more aware of their own preferred style and behaviours. They can also identify different styles and behavioural traits of IFAs. This awareness leads to an understanding of how and when to deploy or modify their natural style.

About Thomas International

Thomas International's system comprises behavioural / psychometric assessments, aptitude and ability tests, job profiling and skills tests.



The behavioural profiling tool enables us to understand, realise and develop the full potential of your staff. It provides managers the tools to motivate, stimulate and encourage individuals in the work environment by raising their self awareness, self esteem and confidence.

www.m-hl.com/b2b

Helping Account Managers to understand their personal strengths and behaviours

Momentab2b provide the development framework and environment which includes:

- A detailed report on an Account Manager's preferred style and likely behaviours
- An audit of their preferred selling style
- An audit of how best to manage an Account Manager
- An audit of likely training requirements
- Individual analysis, feedback and coaching
- Work and non-work related exercises which demonstrate the power of understanding personal style and behaviours

Identifying IFA's personal styles and maximising sales opportunities

Working with the **Thomas International** behavioural assessment tools, **Momentab2b** is able to help Account Managers:

- Become more self aware around their own strengths and limitations
- Identify IFAs' preferred working and social styles
- Adapt their style to match that of the individual IFAs
- Build a strategy for dealing with key IFAs' personality styles, to include:
 - How best to deliver sales messages
 - How to sell to their needs
 - How to structure sales presentations, provide information and handle objections
 - Pre and post appointment activity for different IFA types

We will work in consultation with you to tailor any program to meet the exact requirements of your business.

What some of our customers say about us;

"Momentab2b have provided our account managers with a renewed focus on the sales process and this has played its part in increasing our business levels during 2006."

"Momenta is not just a training programme, it is a culture in how to develop your business by investing in your people. A very worthwhile investment."

Read more about what our customers think at; www.m-hl.com/b2b

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.

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