

Are you getting the most from your Sales Force?

Core Account Management

Intermediary account management is a balance between relationship management and sales skills.

Traditionally, relationship and service have been the key factors in determining success in this marketplace, however, in an environment where most providers are competing for the same top IFAs' business, the traditional skill set alone is now often not enough.

The intermediary sales process is rarely defined and often the outcome is one of "Hope" rather than an understanding of why an IFA will or will not support your proposition.

Whilst recognising the good work undertaken, the following are often typical issues:

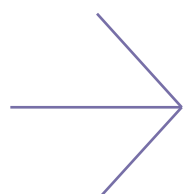
Typical Issues:	Momentab2b Solutions:
Account Managers only covering a % of panel	Segmentation strategy to cover all of panel
No clearly defined sales process	Simple, flexible and effective sales process
No clear definition of what good looks like	Best practice shared and clarity around expectation
Calls often unstructured with no objectives	Structured calls with clear objectives
Poor or inconsistent quality of information held on IFAs/RIs	Consistent & relevant information held on IFAs/RIs
Good relationship with IFA firm/RI but poor business return	Professional relationship resulting in predictable business support
Account Managers viewed as product pushers by IFAs	Product presented as part of a broader added value proposition
Lack of consultative skills	Account Manager viewed as trusted business consultant
Home-based Account Managers feeling isolated and remote	Motivated Account Managers working to consistent and clear objectives

Momentab2b has many years experience of working in the intermediary sales marketplace. We have developed the model below as a working Account Management Process.

Account Selection & Categorisation			Account Planning & Implementation		
Key Account Selection	Account Information Gathering & Analysis	Objective & Strategy Setting	Account Planning	IFA Activity	Monitoring & Review

To find out more, call **Chris Smart** on **07770 775541**
e-mail **b2b@m-hl.com** or visit **www.m-hl.com/b2b**

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Momentab2b offers a suite of practical Account Manager tools, processes and skills training that adds value to the Account Manager, the IFA and the product provider:

The tools include:

- Job descriptions, competencies and demonstrable behaviours
- Account management processes
- IFA fact find
- Business planning framework
- Account analysis tools
- Segmentation model
- A constructive skills analysis process

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
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The programme is very practical and can include 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

Our pool of IFAs provides a range of business type, business mix and personalities so that we can meet your specific requirements. Each of our IFAs understands the aim of **RealPlays** thus ensuring the balance between business reality and developmental opportunity.

As a follow up to **RealPlays** our IFAs will provide a written feedback form for each meeting / call so as to provide a customer's perspective of the learning process

What some of our customers say about us;

"Momentab2b have provided our operation with a sales structure and focus in the way we manage intermediaries. Their complete understanding of our marketplace differentiates them and what they can add to what we do."

"Our account managers developed a framework which they applied to their accounts. It is always difficult to measure direct benefit from the programme but we have increased business by 65% - every account manager has exceeded target and we now have 20% more new customers."

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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