



*Are you delivering what your customers need?*

## Customer Service – IFA Awareness Workshop

In today's 1% marketplace it is increasingly difficult to obtain differentiation through product alone.

IFAs are looking far more at the broader proposition and Customer Service as the key differentiator sits at the heart of a provider's offering.

The challenge and need is to build an IFA focused Customer Service proposition.

People often refer to the sale of financial services products as 'intangible sales' as you cannot touch the product. Therefore the tangible element is how the customer i.e. the IFA, feels about the service they receive when dealing with a provider – the service experience is the product.

### Customer Service – an attitude not a department

**Momenta**2b**** offer a one day Customer Service – IFA Awareness Workshop which helps Customer Service teams;

- Understand why customer service is key
- Increase their understanding of the marketplace they operate in
- Understand what an IFA does and how the service provided really impacts
- Identify internal customers and their requirements
- Understand how they can work individually and as a team to meet necessary agreed client service levels
- Identify and gain the skills required to improve the customer experience
- Align themselves with the sales teams

Typically, we work in conjunction with the sales and customer service functions when designing the programme to ensure that the content is relevant for your business and provides the desired results.

We specifically concentrate on the following skills within the programme:

- Telephone skills
- Questioning and listening skills
- E-mail as a business medium
- Creating an impression
- Making outbound calls effectively
- Managing customer expectations
- Dealing with dissatisfied customers
- Building a customer service culture

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# momenta *b2b*

Many companies experience a disconnect between sales and customer service functions which can result in the sales force having a lack of confidence in the customer service function.

Customer service staff often do not have a clear understanding of the requirements of their internal customer; the sales force or their external customer; the IFA community.

Understanding the Intermediaries' world	Understanding the Account Managers' world
<ul style="list-style-type: none"><li>• Business issues facing IFA</li><li>• Business models IFAs work to</li><li>• What do the IFAs' clients want?</li><li>• The IFA's sales and servicing processes</li><li>• What impacts on the service an IFA provides clients?</li></ul>	<ul style="list-style-type: none"><li>• Role of the Account Manager</li><li>• Business issues facing Account Managers</li><li>• What good customer service is for an Account Manager?</li><li>• How Account Managers can help the customer service teams</li></ul>

Seeing and listening to a real IFA's experience provides a better understanding of the customers perspective. For this reason Momentab2b utilise practicing IFAs to deliver this programme.

What some of our customers say about us;

*"Their complete understanding of our marketplace differentiates them and what they can add to what we do."*

*"Often training can be theory based and not pitched in the real world, but momentab2b's delivery was relevant, realistic and easy to implement"*

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