Consultative Sales Excellence to Help Build Collaborative Relationships

Building Deeper, Broader and Smarter Relationships

CHALLENGE

Prudential were seeking to give their face-to-face and telephony Account Managers the opportunity to enhance their capability and skills in consultative sales. In order to continue to build deeper, broader and smarter relationships with advisory firms, Account Managers needed to move beyond a transactional conversation. To develop their business, understand their firms' requirements and build truly collaborative relationships, interactions had to become more consultative.

Another key part of their requirements was that the Managers needed the confidence and ability to lead their teams, manage change, develop performance and embed a positive team mindset.

SOLUTION

Bigrock designed and delivered a three-stage development programme to address the specific requirements of the different roles in scope.

Starting with the managers, Bigrock delivered a two-day Management Excellence programme. This was a series of practical workshops which focused on the key issues and challenges faced in managing their teams and developing their people. Managers were then in an ideal position to aid both the Telephone Account Managers (TAMs) and Regional Account Managers (RAMs) in their own bespoke programmes which ran subsequently.

TAMs explored how to adopt our proven, 3-stage consultative sales structure during their phone interactions, opening up the conversation and introducing new solutions by understanding the adviser's and client's needs. All within a faster-paced telephony environment, where there is often less time with the adviser.

The programme for RAMs covered these same techniques, albeit applied to their specific requirements in face-to-face meetings, calls and other interactions with their advisory firms.

Embedding is a crucial part of any training programme, so to help minimise knowledge fade and help further embed the learning, we also introduced teams to our digital coaching tool – Coachical.

RESULTS

The programme gave Prudential's Account Managers a reproducible, yet flexible, consultative process, customised for both face-to-face and telephony environments, with ongoing support from managers.

With both practical and digital solutions in place, the Consultative Sales Excellence programme has generated a lasting, positive change in adviser interactions leading to greater levels of trust, and more collaborative relationships.

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Paul Irvine and Colin Milne, the Trainers who delivered the workshops, said:

"From a facilitator's perspective, a highly successful and enjoyable programme that can be attributed to a number of factors which include:
- ***The investment made in the discovery phase where Bigrock gained hugely valuable insight, allowing for tailored design and bespoke delivery of each of the courses.***
- ***The on-going involvement and guidance of Senior Leaders and Management throughout the programme, a truly 'top down' approach.***
- ***A highly experienced open-minded audience who were well prepared coming into the training events, and not afraid to challenge or be challenged.***
- ***The practical nature of the events, with the absolute focus always being on the audiences' current day to day reality.***
- ***The focus and follow through on post training implementation support and embedding, delivered through the management line and follow up Bigrock courses.***

With return on investment always being at the forefront of our minds, it's great to hear that about the positive results where the various skills, approaches and having the right mindset have now been applied in role."

Lou Macari, distribution development director at Prudential UK, who commissioned the programme, said:

"The real testament to any programme is the extent to which the learning is successfully applied and embedded into the business. Bigrock has set a new benchmark for excellence and the learning and methodology continues to grow and shape the conversation between managers and account managers and their customers.

I would highlight three key reasons for the success of the Bigrock programme for Prudential UK:
1. ***The experience, professionalism and passion of the facilitators***
2. ***The commitment and drive of Bigrock to understand our business and our key objectives and to use this insight to shape and deliver the content***
3. ***The strong commercial focus demonstrated by the facilitators to ensure that every aspect of the programme had direct relevance to our daily working lives and helping the attendees to see how the learnings can be applied to develop more successful and mutually beneficial B2B relationships with their accounts."***

FEEDBACK

"Great. Really makes me feel I can make simple steps to greatly improve my effectiveness." - Telephone Account Manager

"Excellent delivery & very engaging. I feel better equipped to build more mutually beneficial relationships." - Regional Account Manager

"Probably the most relevant course for what I do on a day to day basis." - Regional Account Manager

"Very well delivered - I can use immediately with two key firms." - Regional Account Manager

"A much closer relationship with a number of accounts who now see me as a resource rather than a pest!" - Telephone Account Manager

"Great to have some development which is very specific to the role & to the challenges faced rather than generic." - Manager

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