TRUSTED ADVISOR SKILLS

AUDIENCE

FL Front-Line Leaders

LL Leaders of Leaders

FORMATS

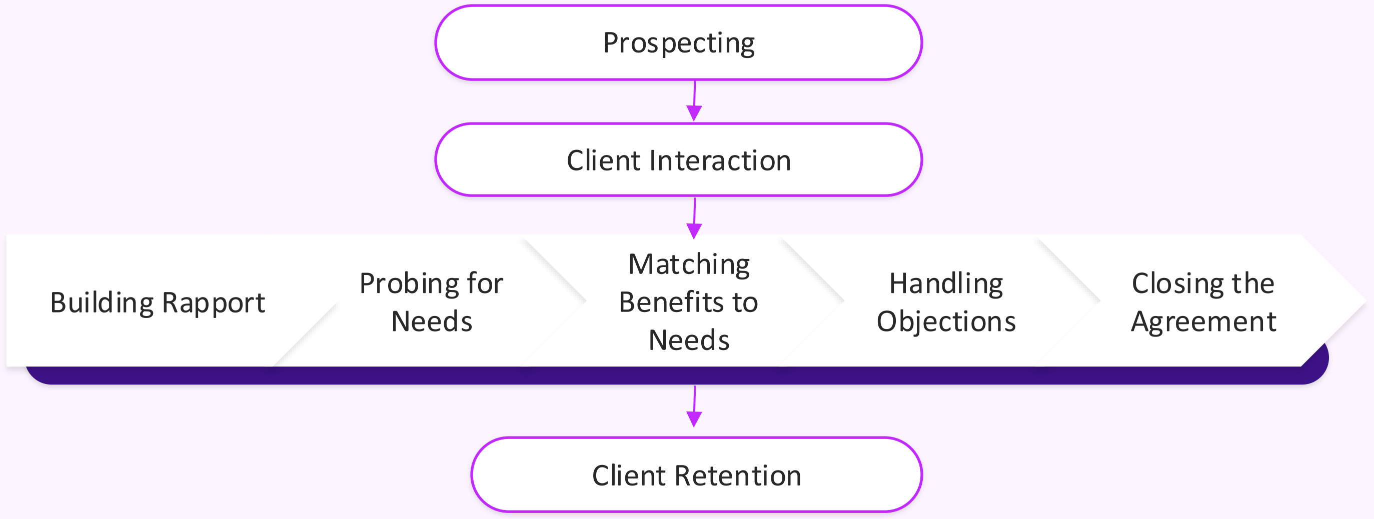
In-Person: 6.5 hrs.

Virtual: 2 hrs. X 3 sessions

COURSE **OVERVIEW**

This interactive and powerful course provides a set of principles and proven tools to develop client engagement skills among participants. Participants learn to improve self-awareness while keeping a “service orientation” approach, which adds value to every client interaction. This course equips participants with the following techniques to become a trusted advisor:

- Uncovering client aspirations and goals
- Asking questions, listening, and bringing out the best in clients
- Adding value to client relationships



SELLING **SMART MODEL**

LEARNING **JOURNEY**

Prework

- Meeting with your Manager

Workshop

Preparation for Client Interaction

- Trusted Advisory Mindset
- Rapport Builders
- Establish Emotional Foundation for Selling

Understanding Client Needs

- Selling SMART Model
- Advocacy and Inquiry
- Empathetic Listening and Powerful Questioning

Handling Objections

- Types of Objections
- Five-step Process
- Closing the Agreement

Post-Work

- Action Planning
- 30-60-90 Day Action Plan Reviews *
- Virtual, Group Touchpoint Session *

* Recommended custom add-ons. ** Only applicable to VILT

LEARNING **OUTCOMES**

1. Strong client relationships based on trust
2. Client loyalty and new referrals
3. Increased efficiency in business deals
4. Confident and satisfied workforce with improved forecast data

