

# Case Study: EQD Sales Curriculum

## The Challenge

Senior EQD Sales Management of a tier 1 universal European bank approached Alpha to help enhance their EQD sales teams selling technique, targeting their new joiners, experienced sales and sales managers. Being within such a competitive and target driven landscape, management identified the increasing need to set a benchmark for best practice, expand client coverage, and increase the cross-selling of products to help improve profitability.

As well as aiming to maintain a high level of best practice, Management acknowledged teams were decreasingly picking up phones and engaging with their clients in a much less personal manor which devaluing the whole customer experience. Their team increasingly relied on making contact via IB chat and lacked innovative ways to approach their sales calls and entice their clients with new business and cross-selling of products.

The key aim of this programme was to:

- Set the standard of best practice across teams.
- Build enough confidence in their salespeople to enable them to pick up the phone and engage with their client directly.
- Explore new ways to approaching sales calls to gain interest from their clients.
- Increase the whole client relationship experience in order to deepen relationships and become more profitable.
- Provide the necessary skills to help facilitate the transition from producer to sales manager/leader.

## The Solution

This sales curriculum was delivered via 3 levels of progression. By working alongside senior management, Alpha identified crucial learning points which needed to be addressed during this training programme. Through the use of a classic sales development framework, Alpha developed and tailored training sessions for each level, focusing on EQD sales, which addresses certain business challenges faced at these certain transition points. This intervention provided participants the practical sales skills to overcome these particular challenges.

- **New joiners to 1 year:** Setting the benchmark- what differentiates us from our competitors? How can I be the best salesperson at my firm?
- **Experienced sales:** A highly competitive and target driven landscape – how do I expand client coverage, share best practice and cross-sell products?
  - How do I approach my clients in innovative ways - entice them with new business and cross-sell their products. How can I be increase the whole customer experience to be more profitable?
- **Sales Managers:** How do I transition from being a successful producer to being an effective Manager/leader?

## The Results

This programme was initially developed targeting only experienced sales persons of 2-3 years to enhance current sales technique and to also share best practice. Due to its huge success and support from the business, it was recognised that all EQD sales should have some form of sales development training. Alpha worked alongside BNPP to expand this curriculum further so there was a level 1 for New Joiners and Level 3 for Sales Manager/leaders. As well as expanding this to all the different levels of sales, this curriculum has been globally recognised and adapted to other business lines as well as also being rolled out across different geographies.