Case Study → Institutional Client Sales Academy

Building technically credible professionals into confident, adaptable and commercially effective client partners

Junior Sales

and client-facing professionals at a currency and asset manager

Lumina Spark

personality insight, individual and collective, at the start

6 Modules

from financial selling to partnership, in 2-hour sessions

Vendor to Partner

the relationship shift at the heart of the Academy

THE CLIENT NEED

The commercial challenge

A specialist UK-headquartered currency and asset manager serving global institutional investors needed junior sales professionals who pair technical credibility with the ability to diagnose client needs and build trust. The aim was not to create traditional salespeople, but to move them from knowing the product to engaging the person.

PROGRAMME ARCHITECTURE

01	**Financial Selling**	From product request to client solution (CIRCLES™ model), 2 × 2 hours.
02	**Client Engagement**	Winning confidence and running a first client meeting, with role play.
03	**Communicating with Impact**	Recognising your style and flexing it for the person in front of you.
04	**Influencing with Integrity**	Influence built on relationships, not persuasion alone.
05	**Presenting with Impact**	Structuring complex ideas so clients engage with them and remember them.
06	**Deepening Relationships**	From share of wallet to share of need, with cross-selling role play.

CAPABILITY SHIFTS

Knowing the product → understanding the client
Communicating naturally → communicating deliberately
Delivering information → creating engagement
Persuading → influencing through relationships
Selling products → creating client value
Vendor → strategic partner

WHY IT WORKED

1. Behavioural insight first: Lumina Spark gave a shared language before skills were built.
2. Practice built in and set in financial services, with role play for meetings and cross-selling.
3. It covered the whole relationship journey, not disconnected topics.

THE TAKEAWAY

The Academy went beyond conventional sales training. By starting with Lumina Spark and carrying those insights into the curriculum, it connected who each person is with how they show up with clients.