Case Study → Corporate & Investment Banking Sales Academy

Transformative learning for senior sales professionals in a leading Corporate & Investment Bank

Senior Sales
experienced professionals at a leading Corporate & Investment Bank

3 Days
intensive programme, from foundations to strategic sales

Price to Value
the central shift in how clients are engaged

4.67
documented participant rating

THE CLIENT NEED

The commercial challenge

Senior sales professionals faced an increasingly competitive, technology-led banking market. They needed to move beyond price-centric conversations towards value-led discussions: navigating complex client conversations, understanding underlying commercial and financial needs, and adopting a strategic advisory approach.

PROGRAMME ARCHITECTURE

Day 1	**Laying the Foundation**	Banking environment and market context, Corporate Treasury objectives and organisation, business model discovery, market trends and technology.
Day 2	**Enhancing Client Relationships**	Working capital, matching client needs to bank solutions, powerful questioning, earning the primary relationship, complex regional deals.
Day 3	**Mastering Strategic Sales**	Strategic advisory sales, fact-finding, advanced financial questioning, and an immersive banking case study bringing the learning together.

CAPABILITY SHIFTS

Price-led conversations → value-led discussions
Product conversations → client-needs-led solutions
Standard questions → advanced financial questioning
Provider relationship → primary client relationship
Product selling → strategic advisory selling
Technical knowledge → applied commercial judgement

WHY IT WORKED

1. Technical and commercial capability combined, from treasury knowledge to advisory sales.
2. Designed for experienced professionals: complex client conversations, not introductory selling.
3. Highly applied: case studies and immersive client challenges, ending in a simulation.

THE TAKEAWAY

A three-day programme moved client conversations from price to value and equipped experienced salespeople to act as strategic advisers. Participants reported greater confidence, deeper market understanding and stronger sales capability.