TRANSACTION BANKING ACADEMY

Course Ref TBASCT1

Selling to the Corporate Treasurer

A customisable one-day course delivered in-house for banks and technology companies

Getting inside the customer's head to deliver better responses to RFPs

This one-day course aims to give bank sales teams a real insight into *how* and *why* the corporate treasurer buys transaction banking services. We cover the critical decision points in the sales cycle and look, in detail, at how corporate treasury teams prepare RFIs and RFPs and how they deal with responses from banks.

This is not a sales skills course, but it *is* ideal for bank sales teams who want to really understand their customers and can be delivered in person or, for global banks, through online seminars which can be timed for maximum access worldwide.

During the day we will start with a look at the sales cycle and who the key decision-makers are likely to be on the client side. Using case study examples, we will go on to look at the RFP/RFI process from the client's point of view.

From there we will look at what makes a good or bad proposal and investigate the 'seven deadly sins' in a group exercise, before going on to cover competitive positioning, the 'beauty parade' experience and the back office tour.

Strong on exercises and practical case studies, this course has been designed to deliver measurable ROI in the shortest possible time, in the form of more mandates won and greater share of wallet. It can be adapted to suit the particular needs of your organisation.

By the end of the course participants will:

- Understand the decision-making process in treasury teams
- Be able to identify the key decision makers
- Know how the RFP process works from the client side
- Be able to write more effective proposals that are attuned to client expectations
- Have an insight into why clients react the way they do

Course Tutor: **David Kelin** possesses invaluable commercial experience gained from over twenty years working in leading organisations in the areas of liquidity, treasury and cash management. These include Bank of America, Citibank and Lloyds Bank and Alterna Technologies. David is now a partner at Zanders UK LLP helping companies in the areas of cash and liquidity management, payments and collections and bank selection.

*For more details or to book this course for your team, contact **Diana Henderson** on +44 7770 404801, e-mail dianah@transactionbankingacademy.com or visit www.transactionbankingacademy.com*