Advice Process I: Sales and Relationship Skills

Purpose: This course is a compulsory element of the Certificate in Financial Services and is for people who need to establish basic consultative selling skills within the industry-recommended advice process.

Course content:

- » The six-step advice process
- » Role of the financial adviser
- » Psychology of the buyer (client needs and wants)
- » People interaction skills
- » Questioning and listening
- » Planning & preparation
- » Sales process

Learning outcomes:

On successful completion of this course, learners will be able to:

- » explain the role of the personal financial adviser in the six-step advice process
- » establish and manage the relationship with client
- » explain the communication process and demonstrate effective communication skills
- » develop and nurture relationships
- » conduct a client meeting following the six step advice proces

Delivery methods:

This course is designed to be delivered through a combination of individual study and in a classroom/workshop format led by an experienced facilitator. This course is not available through the Adviserlink distance learning programme.

This course is approved by the New Zealand Qualifications Authority under the provisions of the Education Act 1989, and Adviserlink Learning Ltd is accredited to teach it.

Assessment:

Assessment for Classroom option:

Assessment	% of Overall Assessment
Observed skills checklists and feedback sheets – peer review	100%

Pre requisite/s:

Open entry

Dates of course/s:

Please refer to the course calendar on our website www.adviserlink.co.nz for the date/s and location of our classroom options.

PO Box 1056 Wellington T: 4 471 1975 F: 4 471 1016
E: training@adviserlink.co.nz www.adviserlink.co.nz

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