# Domain Expertise Sales Education:
# Knowing and Educating Your Sales Force

This Financial Insights Domain Expertise Sales Education program provides your firm extensive knowledge on how to find the right buyer within the many silos of financial services institutions. We provide your sales teams with in-depth industry insights on the trends, challenges and pain points of the financial services market, and offer guidance on how these factors impact IT spending by segment within financial services. The goal of these sessions is to enable your sales force to communicate more effectively with clients and prospects as they target specific market segments within financial services for your products and services.

Financial Insights understands that time away from the field is an expensive investment for your company therefore we prepare, organize, prioritize, need-to-know information in a condensed but highly interactive session. Financial Insights Domain Expertise Sales Education sessions are most effectively delivered as on-site 1/2-day interactive discussion seminars but are also available as online Webcasts and telebriefings. Sessions are offered in two versions, standard or premium. In addition to the standard 1/2-day session, the premium package includes 12-month access to sales tools that may be used directly with customers and prospects.

We also offer more in-depth training sessions for sales and corporate management who need to refine their vertical market messaging, positioning, strategy and go-to-market execution.

## *Benefits*

**For sales professionals:**

- Obtain domain expertise and deep knowledge on the current issues your customers and prospects face within their specific market area (retail or corporate banking, trading, etc.)
- Position your offerings more effectively and strengthen the sales approach based on valid information and pertinent insights
- Turn the knowledge gained into another reason to call the customer who will be interested in hearing what Financial Insights has to say through you
- A 12-month license for a dozen Financial Insights graphics which can be incorporated into sales presentations and proposals to demonstrate trends and market needs that your offerings address (license included with premium package)
- An Industry Executive Brief, which speaks to the customer or prospective buyer on trends and need-to-know information, used as a sales leave-behind and reason to follow-up (license included with premium package)

**For corporate and sales management:**

- Fine tune your financial services market strategy with Financial Insights data and analysis
- Set more realistic sales quotas based on current spending plans based on forecasts by Financial Insights

*Sample Agenda A*

## *Domain Expertise Sales Force Education: Knowing and Educating Your Team (For Sales Professionals, On-Site)*

1. Kick off call prior to event to understand session attendees (e.g. offers, regions, industries represented by attendees etc) and to reconfirm needs and expectations: 1 hour
2. Kick off day of event with introductions and agenda review: 15 minutes
3. Analyst presents vertical market industry trends and IT outlook: 1 hour
   - Scope of Financial Services Industry (within context of your offering)
   - Key Business Trends Impacting the Financial Services Industry
   - IT Priorities and Investments by Financial Services Industry
   - Drivers and Inhibitors for Financial Services Industry IT Spending
   - Market Opportunities
4. Q&A: 1 hour
5. Wrap up with analyst summary of recommendations: 30 minutes

*Sample Agenda B*

## *Sales Force Education: Knowing and Educating Your Team (For Corporate and Sales Management, On-Site)*

1. Prior to on-site presentation, you present your intended financial services market sales strategy and messaging to Financial Insights via teleconference or in person to allow Financial Insights to prepare a tailored on-site presentation: 1 hour
2. On the day of the on-site presentation, kick off with introductions and agenda review: 15 minutes
3. Analyst presents vertical market industry trends and IT outlook: 1 hour
   - Scope of Financial Services Industry (within context of your offering)
   - Key Business Trends Impacting the Financial Services Industry
   - IT Priorities and Investments by Financial Services Industry
   - Drivers and Inhibitors for Financial Services Industry IT Spending
   - Market Opportunities
4. Q&A: 1 hour
5. Break: 15 minutes
6. Analyst reviews/critiques/comments on your financial services market sales strategy and messaging: 1 hour
7. Round-table discussion on topics covered: 30 minutes
8. Wrap up with analyst summary of recommendations: 30 minutes

Note: Specific financial services sales force training session topics will be identified prior to the session. An Financial Insights project manager will coordinate session dates and pre-session calls as needed.

***For more information contact your Financial Insights account executive or email:***

*sales@financial-insights.com*