

Behavioural Finance Sales Module

1 day
Course

'Behavioural Finance in Sales'

Course Objectives	To introduce the effect behavioural biases have on the decision making processes of clients and the risks and opportunities this provides.
Who Should Attend?	All those involved in sales and the management of sales teams. Sales, Financial Advisers, Wealth Management
Course Outline	<ul style="list-style-type: none">▪ What Influences how decisions are made?<ul style="list-style-type: none">○ The key inputs of decision making○ Rational and emotional decision making▪ The impact of Disruptive Events on decision makers<ul style="list-style-type: none">○ Motivations and Beliefs▪ Strategic communication<ul style="list-style-type: none">○ It is not what you say it is what they hear...○ The power of language - framing
Learning Outcomes	<ul style="list-style-type: none">▪ Knowledge of what impacts decision making▪ Knowledge on the relationship between decision making and the sales process▪ Introduction on framing the sales message appropriately
