

STAFF TRAINING

MODULES



MODULE 1: THE BUSINESS ENVIRONMENT

This module will provide you with:

- An overview of the SA financial services industry.
- A high level understanding of the legislation governing the industry.
- A basic understanding of the six-step financial planning process.
- Insight into the products offered in the SA insurance and investment industries.
- An idea of how to conduct yourself in an advisory services office.

MODULE 2: CLIENT RELATIONSHIP MANAGEMENT

This module will provide you with:

- Guidelines for developing a client service strategy in your business.
- A better understanding of key communication skills.
- Practical information on how to communicate with clients.
- Hints on how to deal with angry clients.

MODULE 3: RECORD KEEPING AND PROCESS MANAGEMENT

This module will provide you with:

- A better understanding of operational processes and procedures.
- A clear view of how to address record keeping in your business.
- The knowledge you need to develop documented procedures.

MODULE 4: EFFECTIVE USE OF TECHNOLOGY

This module will provide you with:

- Practical advice on appropriate hardware and software for your office.
- Tips on securing your technology and data.
- Ideas on how best to use elements of technology in your business.
- What you need to know about social media for your business.

MODULE 5: TIME MANAGEMENT

This module will provide you with:

- An understanding of time management and dealing with time wasters.

- Information on planning to help you make even better use of your time.
- The knowledge you need to manage and control meetings.

MODULE 6: ADVANCED CLIENT MANAGEMENT

This module will provide you with:

- An understanding of your role in executing service strategy.
- The knowledge needed to segment a client base.
- Tips on how to differentiate client services.
- Information on how to measure service satisfaction.
- Tips on how you can assist in the advice delivery process.

MODULE 7: STAFF MANAGEMENT

This module will provide you with:

- An overview of the legislation that governs staff employment.
- An overview of the principles of staff management.
- Useful hints on the appointment and retention of staff.
- A better understanding of performance measurement.
- How to link remuneration and incentives to performance.
- Tips on how to handle people problems in the office.

MODULE 8: FINANCIAL MANAGEMENT

This module will provide you with:

- An understanding of how income is derived in your business.
- An insight into budgeting and tracking your spending.
- Managing petty cash.
- Insight into Internet banking.

MODULE 9: PRESENTATIONS AND EVENTS

This module will provide you with:

- The required knowledge to put together client presentations.
- The chance to practice developing presentations.
- Useful information about managing and controlling client events.