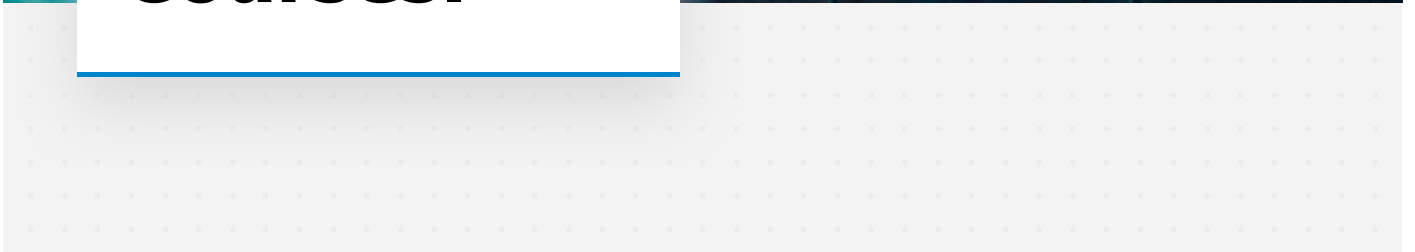




**Retention
Training
Courses.**



Retention Training Courses.



Introduction.

Retention continues to be a critical part of our overall sales process, so here at ALPHERA Financial Services, we have designed a comprehensive suite of Retention training courses to support you and your business in delivering an effective Retention Strategy.

This brochure will provide you with details of the content of each course, target audience and cost as well as information on how to book.

The training programmes work with our own training team as well as external experts to ensure we are able to offer the best possible support to you and your business.


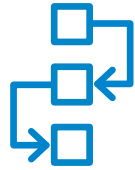

At the back of the brochure we have included an easy guide to identify which courses are appropriate to various job roles.

Should you require any further information then please contact your Business Development Manager.

We look forward to welcoming your teams onto our Retention training programmes.

Contents.

Review the table below to gain an understanding of how each of the courses will support your staff. Assess the needs of your team in line with the course content and book them on the relevant course/s that will ensure you are equipping them with the tools for success.

People	Process	Systems
		
MANAGING RETENTION AND DRIVING SUCCESS		
	MAKING EFFECTIVE eMASTER CALLS WORKSHOP	
CALLING FOR RETENTION		
eMASTER ESSENTIAL SKILLS		
		eMASTER SYSTEMS WORKSHOP

Managing Retention and Driving Success.



Provider.

ALPHERA Financial Services

Overview.

This innovative one day programme is designed for Sales and Business Managers that have responsibility for Financial Services Customer Retention. It gives delegates an in-depth and practical overview covering all aspects of retention from how to engage with customers throughout their ownership, through to implementing and maintaining a sustainable retention process by utilising all of the resources available.

As an outcome of this programme delegates will leave with their own bespoke Retention Plan, which they have created specifically for their Retailer and sales team.

Who is this course aimed at?

Sales Managers and Business Managers who can implement change in order to improve the Retailer's retention performance. It is highly recommended the Sales and Business Manager attend together on the same day in order to achieve a unified process takeaway.

Content.

- Understand why retention is so important and the benefits for Partners, using a practical illustration specific for the delegates own Partner.
- Identify the obstacles that can prevent successful retention performance.
- The factors that are important in delivering an effective contact plan.
- To be fully aware of the tools and support mechanisms available to the network.
- How to implement change and manage an ongoing process.
- Leave with a bespoke workable retention plan.

Calling for Retention.



Provider.

ALPHERA Financial Services

Overview.

In today's market it is essential that sales teams are able to adapt to the individual requirements of customers and have the ability to deliver an effective, personalised message, through a variety of different channels.

This programme has been designed to provide delegates with the knowledge, skills and attitude required to effectively engage with customers throughout their ownership in order to maximise their experience and the Retention opportunity.

Who is this course aimed at?

Any member of the sales team who is responsible for contacting Financial Services Retention customers.

Content.

- Understand why retention is important and identify the benefits to the customer, Partner and sales staff.
- What are the barriers that prevent us from being successful?
- The key elements to an effective contact plan.
- How to handle common objections.
- Establish clear structure and objectives for every contact.
- How to utilise different channels to personalise and improve engagement.
- Identify and understand common customer objections faced when contacting for retention, and how to effectively handle and overcome them with confidence.

Making Effective eMaster Calls Workshop.



Provider.

FISC Ltd.

Overview.

Two day Partner course using a consultative approach that encourages candidate participation. The course uses the Partner's own data to deliver bespoke outcomes that address the Partner's individual needs. There is also a balance between the requirements of both Managers and Sales Executives across the two days to ensure that each understands the role they play in an effective Retention process.

Who is this course aimed at?

Sales Managers, Business Managers, Sales Executives and Retention Specialists.

Content.

Day 1 – Managers

- Overview of eMaster.
- Review of current activity and performance.
- Learn how to create campaigns for new and used car stock.
- Best practice management of national, early settlement, end of term and service campaigns.
- Create own campaigns based on Partner stock and refine the t-card with personalised customer offers.
- Allocate tasks to sales team in preparation for day two.

Day 2 – Sales Executives

- Understanding campaign creation.
- Using a refined t-card to make an effective call.
- Objection handling.
- Live outbound calling.
- Call coaching on live calls.
- Review of activity and results.
- Post course call follow-up with Managers and Sales Executives to embed what was learnt on the day and review results.

Duration:

2 Day

Cost:

Day 1 = £950+VAT, plus trainer expenses per Partner

Day 1&2 = £1595+VAT, plus trainer expenses per Partner

(Partner can run with as many delegates as required)

Venue:

Partner Premises

eMaster Systems Workshop.



Provider.

FISC Ltd.

Overview.

This one day course provides comprehensive training on how to utilise all of the key eMaster features. We will also share best practice on campaign types and advice on how to expand your opportunities. This course is interactive and you will have the opportunity to get hands on experience of eMaster. Delegates should leave the course with the confidence to create their own campaigns based on Partner specific needs.

Who is this course aimed at?

All eMaster users.

Content.

- Overview of eMaster Homepage functionality.
- Creation and management of all campaign types.
- Increasing your opportunity with tiered campaigns.
- Refining the t-card to deliver a personalised customer offer.
- Using the system to locate used car opportunities.
- The use of email, SMS and Word templates.
- Lead management reporting.
- Creation and management of user accounts.

Duration:

1 day

Cost:

£160 + VAT per delegate

Venue:

Regional location based on demand

eMaster Essential Skills.



Provider.

FISC Ltd.

Overview.

This one day course provides the 'Essential Skills' to create effective targeted Campaigns. We will share best practice on how to create powerful propositions for your customer calls. The course is very interactive, giving delegates the opportunity to get hands on experience of eMaster and follow the trainer through the process step by step. Delegates should leave the course with 'real world' opportunities.

Who is this course aimed at?

Sales Executives, Business Managers, Sales Managers and Retention Specialists.

Content.

- Creating campaigns for new, nearly new & used cars.
- Service Campaigns.
- Recording and Reporting in eMaster.
- Overcoming 'difficult conversations' with customers in negative equity.
- HP to Select – opening up more opportunities.
- Delegates coached to make effective campaigns in the 'active' system.
- Calling 'active' customers with powerful propositions.
- Make appointments for the following weekend and sell some vehicles.

Duration:

0.5 Day

Cost:

Per Partner = £450+VAT

Venue:

On-line with one Partner per session

(Partner can run with as many delegates as required)

Training Guide Matrix.



Training programmes	Sales Manager	Business Manager	Retention Specialist	Sales Executive
Managing Retention and Driving Success	✓	✓	✓	
Calling for Retention		✓	✓	✓
Making Effective eMaster Calls Workshop	✓	✓	✓	✓
eMaster Systems Workshop	✓	✓	✓	
eMaster Essential Skills	✓	✓	✓	✓

Course profiles are subject to regular review. If in doubt please contact your Business Development Manager.