

**Pressing the Right Buttons – Knowing Exactly What a Client Wants from You:
2008(MA)**

Presenter:

Mr. Adrian Overholser

Biography of speaker:

Adrian Overholser is CEO of HALO, a specialised marketing and sales training consultancy based in Hong Kong serving clients across Asia since 2003. Adrian imparts learning with passion on marketing and sales matters that leverage his 25 years of broad-based financial services and marketing experience in the U.S., Europe and Asia where he held senior level positions with The Citibank Private Bank, MeesPierson Private Bank & Trust (part of ABN Amro), Fortis Investments and PR agency Golin/Harris. A former banker as well as marketing director and regional sales manager, and veteran of thousands of sales calls across Asia, he brings specific work experience in strategic marketing, brand management, cross-cultural sales and sales management.

Date : 20 August 2014 (Wednesday)

Time : 4:00pm - 6:00pm

Venue : HKMA, 14/F Fairmont House, 8 Cotton Tree Drive, Central, Hong Kong.

Points : 2 CPD hours

Fee : HK\$350

Language : English

Course Outline:

Many financial professionals fall into the all too easy trap of assuming they know what a client expects and wants from them. They then set about focusing on that particular want to the probable exclusion of others. It might be because they think they're very good at reading people, or simply because it's easier to imagine that what is a priority to them is equally important to the client.

After all, as humans, how different can our own wants and desires be from those of others? Aren't we all basically the same? Of course, the answer is emphatically "no."

To avoid this trap of 'misselling', it is critical to determine early on what a client's hot buttons are. You need to focus on exactly what it is they want so that they choose to do business with you for the right reasons. To be sure, the financial services industry is becoming increasingly competitive and clients have a lot of choice when it comes to choosing someone to help manage their financial affairs. How can you make yourself different in their eyes and gain a competitive advantage?

This highly interactive and engaging workshop focuses on a very simple, yet proven behavioural model to determine quickly what most motivates a client to purchase a given product or service. By leveraging this 'sales technique', financial professionals can immediately focus their discussion on what the client wants to hear, and not waste it on matters they care little about.

The following topics will be discussed:

1. The Psychology of Selling
2. Facts about Listening
3. Bridging Features to Benefits
4. The SPACED Purchasing Behavior Model
5. Examining and Interpreting your Offering (Exercise)

Registration Till: 13 August 2014 (Wednesday) (Note: HK\$100 surcharge per person applied for enrolment or substitution after deadline)

Payment Method:

By cheque – Payable to “The Hong Kong Confederation of Insurance Brokers”

CIB CPD Seminars Enrolment Form

To: The Hong Kong Confederation of Insurance Brokers
Room 3407, AIA Tower, 183 Electric Road, Fortress Hill, Hong Kong

Personal Details

Company Name:			
Mem. No.			
Contact Person:			
Tel. No.:		Fax No.:	
Email Address:			
Course Code:		Course Date:	

Details of participants

Name (Eng) <i>(Should be same as HKID card/ Passport)</i>		Name (Chi) (if any)	Registration No.	HKID/ Passport No.
Surname	Other Name			
Total Amount: HK\$ _____ x _____ persons		= HK\$ _____		

Payment Method *(please tick the box)*

Total Amount of HK\$ _____ is paid by:

- Cheque (Cheque No.: _____),
 Deposit of Cash/Cheque, original pay-in slip attached to the application.
 ATM Transfer, original pay-in slip attached to the application.

Declaration:

1. We have read and will observe the "Rules Governing CPD Activities".
2. We understand:
 - i) Enrolment will be accepted on a first-come-first-served basis.
 - ii) Enrolment without payment will not be entertained.
 - iii) Enrolment fee is non refundable
 - iv) Official receipt will be issued only upon request in writing within one month after seminar held
 - v) HK\$100 surcharge per person applied for enrolment or substitution after deadline.

Bad Weather Policy: Seminars will be cancelled if a No. 8 or higher tropical signal or black storm warning is raised within 2 hours before the start of registration or during the activity. In the event of cancellation due to bad weather, the seminar will be either re-scheduled or registrations may be transferred to other CIB CPD seminars of same fee level. Notice of re-scheduling will be issued in or around 14 days. No refund will be given.

For Office Use Only	
Cheque No.	
Verified By	
Payment Cleared	

Company Chop & Authorized Signature

Date

(Please photocopy the Form if space is not sufficient.)

Rules Governing CPD Activities

Enrolment

- 1) CIB CPD Activities is open to CIB Members for enrolment while the participants need not be persons registered with CIB.
- 2) All enrolment should be sent with payment to the CIB Secretariat prior to the specified closing date for each Activity.
- 3) Enrolment will be processed on a first-come-first-served basis. Enrolment without payment will not be entertained.
- 4) Confirmation of enrolment will be sent by fax to enrolling Member. In case of not receiving any confirmation 1 day prior to the Activity, the enrolling Member should contact the CIB Secretariat for the status. Only those who have their enrolment confirmed will be admitted to the venue.

Substitution or Cancellation

- 5) Written request from enrolling Member for substitution of participant prior to the specified closing date of an Activity will be entertained.
- 6) Substitution is allowed after the specified closing date of the Activity but a fee is applicable.
- 7) Activity will be cancelled if a No. 8 or higher tropical signal or black storm warning is hoisted within 3 hours before the commencement of activity or during the Activity. The activity may be re-scheduled or registrations may be transferred to other CIB CPD Activities of same fee level. No refund will be given.
- 8) CIB reserves its right to cancel or re-schedule an Activity with prior notice. Any fee paid for a cancelled or re-scheduled Activity will be refunded to the enrolling Member.

Registration of Attendance

- 9) Participants have to prove their identities by showing the Hong Kong Identity Card or passport or driving license at designated registration counter and to sign in for confirming their attendance. No other proof of identity will be accepted.
- 10) **30 minutes** after the commencement of an Activity, registration counter will close and *NO registration of attendance* for that Activity will be entertained. The participant may sit in the Activity but will not be granted any certificate of attendance.

Granting of CPD Hours

- 11) When the Activity finishes, participants should collect the certificate of attendance before leaving. Participants who fail to collect certificates of attendance before leaving will be considered as early retirees.
- 12) The following participants **will not** be awarded certificate of attendance to earn the CPD Hours:
 - (a) those failing to register attendance before the registration counter closes; or
 - (b) those, except for the break allowed in the programme, taking any other break longer than 10 minutes; or
 - (c) those retiring earlier than the end of the Activity.
- 13) **ONE** CPD hour will be deducted for any late arrival for over 10 minutes but not more than 30 minutes after the commencement of the Activity.
- 14) If the certificate of attendance is lost, the participant may apply in writing for a letter of certification at an administration fee of HK\$50 payable to CIB.

持續專業培訓活動的規則

報名

- (1) 本會所辦的持續專業培訓活動須由會員公司替參加者報名，而參加者不需要是本會註冊的人士。
- (2) 所有報名須連同費用須在每項活動指定的截止日期前遞交予聯會秘書處。
- (3) 報名以先到先得的方式處理。未付款的報名一概不受理。
- (4) 報名確認將以傳真通知會員公司。若在活動前一天仍未收到傳真的確認通知，會員公司應逕自聯絡本會秘書處了解報名情況。只有經確認報名的參加者方可進入會場。

替換或取消

- (5) 會員公司可在活動指定的截止日期前，以書面要求替換參加者。
- (6) 活動指定的截止日期後，替換參加者須繳付費用。
- (7) 若在活動開始前 **3 小時**或進行期間，天文台發出熱帶氣旋警告信號八號或以上或發出黑色暴雨警告信號，活動將告取消。該活動將可能擇日重辦，有關報名費用可轉報其他同價的活動。不設退款安排。
- (8) 聯會保留在預先通知的情況下取消或更改活動舉行日期。已繳費用將退還予報名的會員公司。

登記出席

- (9) 參加者到場登記時須出示香港身份證、護照或駕駛執照，及於進入會場前在登記櫃檯簽署確認其出席記錄。其他的或任何身份證明文件將不會被接納。
- (10) 登記櫃檯將於活動開始後 **30 分鐘關閉**。登記櫃檯關閉後不再為參加者登記。參加者仍可列席活動但將不獲發出席證書。

頒發進修時數

- (11) 活動完結後，參加者應領取出席證書方可離開。未有在離開前領取證書者作早退論。
- (12) 以下類別的參加者將不獲發出席證書：
 - (a) 未有在登記櫃檯關閉前登記出席者；或
 - (b) 除程序中安排的小休外，離開會場作息超過 10 分鐘者；或
 - (c) 早退者。
- (13) 由活動開始時，任何人如遲到時間為 10 分鐘至 30 分鐘，將會被扣取 1 個 CPD 時數。
- (14) 倘遺失了出席證書，參加者可以書面申請證明信，惟需繳付行政費用 50 港元。