

# FIRST YEAR MD BUSINESS DEVELOPMENT SKILLS:

## INITIATING NEW RELATIONSHIPS

TEMPLAR ADVISORS

**High growth companies get noticed early.** Bankers who wait to make contact once interesting businesses are on the market's radar will be too late. The best bankers know this. They have formed relationships, built trust and demonstrated value well before others. This patience and foresight, recognizing a 12-24 month lead time, pays off for those with the skills and discipline to establish early contact successfully.

Templar's Initiating New Relationships course combines video interviews with your firm's senior executives and practice leaders, with our proven sales training and coaching methods.

This is small group, high-touch training, targeting new MDs at a pivotal – and vulnerable – career stage.

### THE 'SALES' PROBLEM

Senior finance professionals rarely see themselves as salespeople. Understandably they shy away from lead development, seeing it as pushy. On the other side, CEOs and business leaders hate being overtly sold to. This creates an opportunity for those who can stand out as useful and not self-interested.

### COURSE OBJECTIVES

Success is defined initially as having a conversation that leads to another one.

Ultimately, it's defined by winning a mandate.

Participants will be able to:

- Develop leads and relationships earlier
- Understand how to make a cold call 'warm'
- Research prospects using a wide variety of tools and approaches
- Design 'hooks' that work
- Learn key techniques, tips and tricks – over Zoom, phone and email
- Understand and use proven approaches and disciplines in networking and outreach

### OUTCOME

Bridge the gap between expert banker and rainmaker.

### HOW WE WORK WITH YOU

Each phase of the course will be supported by curated video clips of interviews with your senior leaders. This increases buy-in and helps overcome bankers' resistance to "cold calling".

Participants will be asked to send practice voicemail and emails - before and after training.

They will work on their own lists of real prospects throughout; crafting tailored messages and approaches – "hooks" – practicing voicemail and email, and reporting back.

This ensures that the content is entirely relevant to your people, and provides data for tracking progress and outcomes.

Participants will develop specific action plans and strategies for the next session and for post-course application and lead development.

### HOW TEMPLAR HELPS

#### SESSION 1: PHILOSOPHY

Bankers have to buy in to a change of approach. Templar will help them see that credentialing and "selling" the firm too early is off-putting and counter productive.

We equip them with a prospect and client centric approach to better start relationships from scratch.

#### SESSION 2. LEAD GENERATION

Networking, research, email and voicemail. Practice, discussion and review

#### SESSION 3. NEXT STEPS

Staying in the game.

Questioning, exploring, Q&A, handling objections and closing.

### BIOGRAPHY



**Hugo Williams** joined Templar in 2010 following a successful career in small-cap IPO origination in the UK, a role which afforded him deep insight into investor needs and extensive experience working with management teams.

#### CONTACT:

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