

Mastering Communication in Financial Services

Simple and powerful techniques for presenting to
colleagues and clients

27 April 2010

6 July 2010

CISI, 8 Eastcheap, London EC3M 1AE

COURSE HIGHLIGHTS

Boost your ability to attract clients and influence colleagues with this interactive one-day financial presentation skills course. Explore a new model of communication and discover the secrets of human relationships, giving you the edge in turning your prospects into clients.

Throughout the day develop techniques to connect with your audience, build rapport, handle nerves, inspire and speak with confidence. Understand how to read your audience effectively and make use of experts in the room to support your key messages.

This course is a must for those in busy financial firms wanting to succeed with prospects, strengthen existing client relationships, and communicate powerfully at all levels.

“You were born with all of the communication skills you will ever need. This course frees you to rediscover them and thrive.” *Christopher Jones-Warner FCSI*

Visit cisi.org/presentation for the full course programme

COURSE TOPICS

- How to prepare
- Structuring a presentation
- How to approach PowerPoint
- Slide preparation
- Dealing with nerves
- Opening and closing
- Relating to an audience
- Using the voice, speaking with passion, posture
- Handling distractions, tricky people, experts, interruptions, walk-outs and noises
- Dealing with challenging questions

COURSE DIRECTOR

Christopher Jones-Warner FCSI has 25 years' experience in the securities industry and chairs City conferences, debates and seminars, interviewing high-profile fund managers such as Anthony Bolton, Mark Mobius and Andrew Smithers, in front of audiences of between 120 and 250 professionals.

He also runs workshops in business relationships and communication for the Chartered Institute for Securities & Investment and for *Playing Hamlet*, where he is a joint director.

“This course was fascinating. Delivered so much more than I expected.”

CRM, Hoare & Co.

Mastering Communication in Financial Services

Simple yet powerful techniques for presenting to colleagues and clients

Start 9.30am

HOW TO PREPARE

- Establishing what your audience wants & researching your audience
- Planning your preparation
- Structuring your presentation & practising effectively

STRUCTURING YOUR PRESENTATION

- Having credibility & delivering your message powerfully
- Techniques for holding the audience's attention
- Making your presentation memorable - getting your message to stick

HOW YOU APPROACH POWERPOINT

- Using technology to enhance your message
- Using Powerpoint as a visual aid and not a crutch
- Dealing with the screen & bouncing back when technology lets you down!

SLIDE PREPARATION

- How to give your presentation depth with simple, effective & powerful messages

DEALING WITH NERVES

- Presenting confidently and naturally

OPENING & CLOSING

- Introducing with impact
- Establishing your credibility to speak
- How to close with inspiration & passion: leaving your audience inspired

RELATING TO YOUR AUDIENCE

- How to build your audience's confidence
- How to really relate to members of your audience
- How to acknowledge points made & the people making them

USING YOUR VOICE

- Practice varying pace, modulation, volume & the power of the pause!

SPEAKING WITH PASSION

- How to speak on your subject with passion & vitality
- Effectively calling your audience to action

POSTURE

- Using posture to convey confidence & enthusiasm in your subject

PRESENTATION NIGHTMARES!

- Managing distractions, interruptions, tricky people & experts
- Dealing with walk-outs & noise

BENEFITING THROUGH QUESTIONS

- How to use questions to pace your presentation
- Improving your credibility with your audience

Finish 5pm

The CISI and the FSA's Retail Distribution Review (RDR)

Under the RDR, the FSA proposes to introduce compulsory CPD for all retail advisers to assist in achieving ongoing competence. It suggests that a minimum of 35 hours' CPD must be completed on an annual basis (or 100 hours over a three-year period) and that such activities should be recorded.

The FSA has proposed as a guide that the CPD should comprise of 60-70% structured learning which equates to 21 - 24.5 hours. Attendance at courses such as this one are activities accepted as part of structured learning.

Delegates who attend any CISI professional training course or conference will earn CPD hours, and Institute members will have these automatically added to their personalised CISI CPD log, which also recommends 35 hours on an annual basis.

Please see cisi.org/rdr for further information.

Venue Details

The Chartered Institute for Securities & Investment
8 Eastcheap, London EC3M 1AE
+44 (0)20 7645 0680
cisi.org
Nearest Tube Station: Monument

To Register

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