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Advisor Sales Training and Onboarding (ASTO)

What is ASTO?

Advisor Sales Training and Onboarding is an interactive digital blended learning program that covers the basic sales skills that every professional financial advisor should possess as a part of the onboarding process in a new organization.

What is the purpose of the course?

Equip new age employees with confidence, adequate knowledge and relevant tricks and tips to achieve more sales. This course will help upskill the freshers and train them to become a successful financial advisor.

Course Objectives

Increase your self-assurance and sell more effectively to get more profits.

Understand the abilities, dispositions, and mindsets necessary for a successful professional advisor.

Learn how to build long-lasting, more profitable relationships with your consumers.

Showcase the techniques used by truly effective salespeople to provide their clients with high-quality service.

Examine what selling is and isn’t

Establish some goals for yourself by completing an action plan at the end of the course, which will help ensure that this training is more than just a one-time exercise and that you put what you learn into practice.

Modules

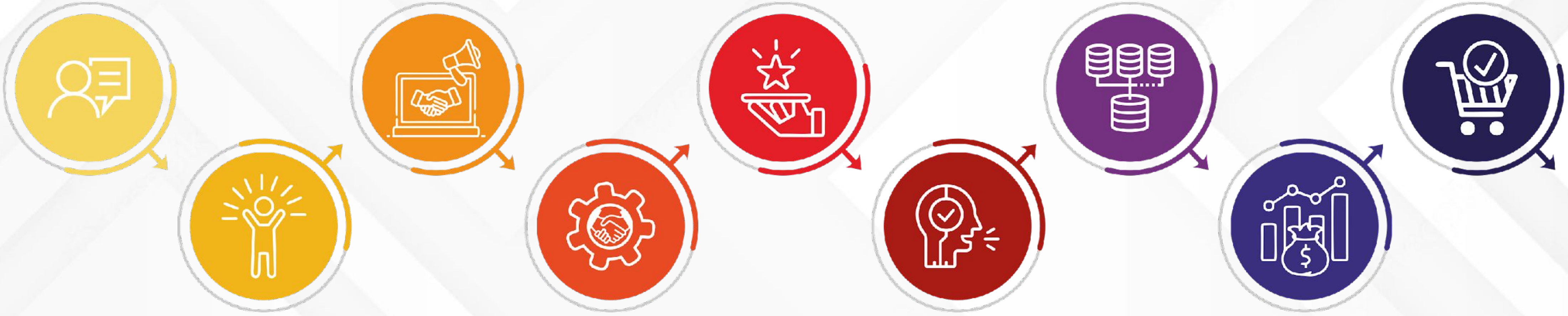
Introduction to Advisor Sales Training and Onboarding

Relationship Marketing

Service Quality Concept

Prospecting and Database Creation

Closing a Sale



Confidence Building

Customer Relationship Management

Effective Communication

Selling Skills

Course Overview

Introduction	a) Objectives and Action Plans b) Rate Your Sales Skills Quiz
Confidence Building	a) Knowledge of a Professional Financial Advisor b) Skills of a Professional Financial Advisor c) Understanding What Selling Entails d) Attitude of a Professional Financial Advisor
Relationship Marketing	a) Definition of Relationship Marketing b) Relationship Marketing and Communication c) Benefits of Effective Relationship Marketing d) Attracting and Retaining Customers.

Course Overview

Customer Relationship Management

a) Traditional Versus Modern View of the Customer

b) What Managing the Relationship Entails

c) The Relationship Ladder

d) Customer Relationship Management Characteristics

Service Quality Concept

a) Concept of Service Quality

b) SERVQUAL

i) Perceived Service Quality

ii) Five Dimensions of SERVQUAL

Course Overview

Service Quality Concept

c) Customer Expectations

i) Understanding Your Customer

ii) People buy People

iii) First Impressions

d) Meeting Customer Expectations

i) Rules

ii) Managing Customer Expectations

Financial Products

a) Basic Life Insurance

b) Savings Products

c) Health Insurance and Annuities

Course Overview

Effective Communication	a) Talking i) Imparting Information ii) Questioning b) Listening c) Building Rapport
Prospecting and Database Creation	a) Database Creation b) Prospecting i) Contacting and Approaching Prospective Customers ii) Purpose of contact
Selling Skills	a) Overview of the four stages of the sales cycle

Course Overview

Selling Skills

b) Getting to Know the Customer

i) Fact-finding/Information Gathering

ii) Agreeing Needs

c) Discussing the Solution

i) Features, Advantages and Benefits

ii) Handling Objections

d) Closing the Sale

i) ABC

ii) Asking for the business

Course Overview

Selling Skills	e) Creating a Customer for Life i) Conducting Customer Reviews ii) Obtaining Referrals f) Sales Cycle Consolidation i) Prospective Customers ii) Role-plays
Close	a) Recap b) Individual Action Plans

Content Formats

ASTO has been developed with engaging, personalized and easily accessible content developed to align with today's learning culture.

Learning content visualization using animation videos, whiteboards, screencasts, video tutorials and reels.

Improved learning absorption with the usage of powerful infographics and data visualization.

Interactive gamified learning programmes

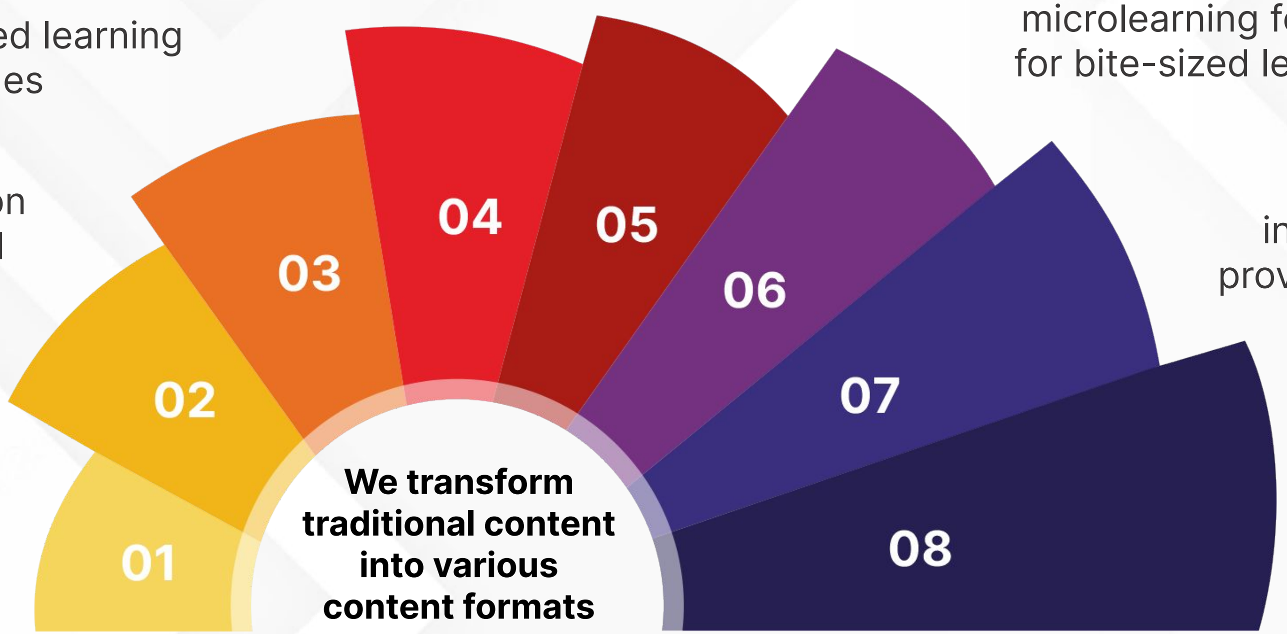
Localised content available in any regional and international languages to suit requirements

ASTO is redesigned according to modern e-learning standards.

Proprietary microlearning formats for bite-sized learning.

Videos, animations, infographics and games provide an engaging learning experience.

Audiobooks, podcasts and webinar services.



Delivery and Distribution

NSEIT LMS

A world-class Learning Management System (LMS) designed to engage learners and empower corporates with business intelligence.

Features:

- Standardize content delivery across multiple geographic locations.
- Learning journey mapping and engagement through data analytics features.
- Powerful content authoring tools with multilingual support.

How to access the course on our LMS?

- User can take the course by logging in on the portal with their unique ids and passwords, provided by NSEIT after enrolling.
- The LMS portal can be accessed on both our website and mobile apps.
- The LMS comes with native Android and iOS apps that offer a quick, easy and memorable learning experience for any time, anywhere engagement.

Available on GET IT ON Google Play | Download on the App Store

About NSEIT DEX

DEX is a Strategic unit of NSEIT Limited and provides End-to-End Digital EdTech & Examination Services and Solutions to Educational Institutes, Government Organizations and various Corporates. We leverage our expertise in Digital transformation, Software development, large Infrastructure Management, cyber security, Cloud services to deliver world class Solutions & Services. One of our key USPs is our ability to deliver and handle critical, large volume, high stakes Projects with structured delivery process, tools, systems and multi-level contingency measures in a flawless manner enabling NSEIT DEX to attain a leadership position in this Industry. We are also empaneled with various Government bodies and PSUs across India as a Partner of choice.

NSEIT DEX's clients include Government Regulators, various Directorate General bodies, Ministries, Central/State Government Depts., PSUs, BFSI, IT & HR Companies, Universities, Professional Institutes, International clients etc.

For more information, visit us at :
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About NSEIT Limited

Established in 1999, NSEIT Limited is India's leading organization with 20+ years of experience in providing Digital Examination & EdTech Solutions, Software development, Cyber Security, RPA, Testing, Cloud Services, large Infrastructure Management Services etc. NSEIT is part of the National Stock Exchange of India (NSEIL) Group of companies with a turnover of Rs. 3000+Cr.

For more information, visit us at : https://nseit.com/

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