

Communications Skills Training for Private Bankers

Kleinwort Benson, the private bank, has run a drama-based communications skills training programme to help its 60 private bankers make the most of networking opportunities and improve their ability to pitch and present its wealth management proposition to potential clients.

Training specialist Steps Drama worked with the bank's learning and development team to develop the two-day programme which included presentations practise, role plays of one-to-one encounters with prospective clients at social/networking events and simulations of formal business pitches. Steps worked in partnership with voice coach Philip Bliss who provided voice training to help the participants achieve greater impact by making optimum use of their voice and their non-verbal communication.

"To develop successful new client relationships, our private bankers need to be able to network and present effectively," said Reed Sylvester, Learning and Development Manager at Kleinwort Benson. "We wanted to provide training in these key business skills as part of our approach to developing our talented people. Steps has successfully provided role players for our private banker training programmes since 2007".

Kleinwort Benson's private bankers began the programme by making a two-minute presentation on a non-work-related issue about which they felt passionate. They received feedback from the Steps presentation skills trainer, the voice coach and their colleagues. They then received specific training on voice issues. The group explored techniques based on breathing and posture, and developed an understanding of how to energise vocal delivery, modulate pitch and tone, increase clarity, control volume, manage speed of delivery, overcome nerves and eliminate unwanted non-verbal communication.

"This was the first time we have used a voice coach," said Reed Sylvester. "He gave the participants a greater understanding of breath, posture and relaxation and helped each individual to communicate in their own personal style. He helped them to strip away any nervous habits or mannerisms that their message, so they could engage with their audience and be themselves. There was a significant improvement when the participants were asked to present again," said Reed Sylvester. "It was obvious that they had taken the learning messages on board."

On the second day, the participants took part in one-to-one role plays, with professional actors from Steps portraying prospective clients. The participants had to explain the bank's proposition and their role, having just met the potential client informally. Again, each participant received feedback on their communication style from the actor, the Steps presentation skills trainer, the voice coach and their colleagues.

"The scenarios were lifelike and challenging. They allowed the participants to practise building rapport in a one-to-one encounter and also gave them the chance to tailor their advice to the individual's circumstances and aspirations. The feedback provided by the Steps actors, who played the potential clients, was invaluable." said Reed Sylvester.

Following the role plays, the group discussed best practice approaches for handling informal one-to-one networking opportunities.

Finally, the participants took part in a simulation. They were asked to make a five-minute pitch to a panel - including senior managers from Kleinwort Benson - who posed variously as either tax advisers, a private client family with their accountant or the trustees of a charitable trust. Following this, each participant received feedback from the panel, their colleagues, the voice coach and the Steps presentation skills trainer.

“The presentations at the end of the programme showed us just how far the participants had come in the two days,” said Reed Sylvester. “They found it an extremely useful and very enjoyable experience.”

After the programme, each participant received a DVD of their presentations, together with bespoke communications skills distracted from notes and personalised advice on their strengths and areas for development as well as practical exercises.

“The training helped our private bankers to more effectively convey the benefits and unique selling points of our approach to wealth management and it showed them how to tailor presentations to individual clients, in terms of the tone, style and body language they adopt,” said Reed Sylvester. “The role play scenarios and the pitching experiences lifted it above anything that we have done in this area before. We’re confident that our private bankers are now better placed to promote our proposition and our brand values to existing and prospective clients.”

The programme ran six times at Kleinwort Benson’s London and Channel Islands offices, with 10 private bankers attending each session.