



TRAINING SERVICES

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Skills

Giving people the tools to do the job

Learning never stops and it will help you grow your business.

Our Vision is to build a sustainable future where our knowledge, skills and expertise can be passed on to others to support business and personal growth.

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About RWA training

Our Vision is to build a sustainable future where our knowledge, skills and expertise can be passed on to others to support business and personal growth.

RWA has developed face-to-face training courses which cover a diverse range of skills and topics, including:

- Telesales
- Negotiation Skills
- Management
- Delegation
- Effective Team Building
- Assertiveness
- Management Processes
- Conflict Resolution
- Communication Skills
- Presentation Skills
- Train the Trainer
- Human Resources
- Time Management
- Stress Management
- Induction Training
- The World of Work
- Working with Customers
- Teamwork
- Client Money
- Vulnerable Customers
- Complaints
- The FCA, TCF & Conduct Risk
- Supervision
- The Insurance Act
- Leadership Development
- Change Management
- Visions, Values and Culture
- Coaching
- Innovation
- Leading a Team
- Motivating your Workforce
- Business skills
- Sales Skills
- Face-to face skills
- Building a pipeline
- Financial Skills

The following pages contain details of a number of the courses RWA provides.

Training is an extremely cost-effective method of developing your workforce, with courses starting from as little as £500 ex VAT.

Identifying training needs

Developing individuals should be at the heart of all businesses. A well-trained, competent workforce provides better service for customers.

In order to meet good business practice requirements, it is clear that firms must ensure that all employees should be subject to structured training and development. Training should be:

- Timely – it should be conducted as soon as possible after the need has been identified
- Planned – a firm should have a structured training plan which should be planned ahead.
- Appropriately structured – when training staff, the firm should consider the best way to approach the training. For example, one to one, face to face training, coaching etc.

The identification of training needs is an essential part of any formal development and training programme. The formal name given is a 'training needs analysis', this is simply the process of identifying the gap between the skills and the knowledge required for the role. RWA will assist you in this to ensure the correct gaps are identified.

Whether it's a shortage of skills or abilities, we can identify during our needs analysis. Failure to address shortfalls may hinder employees in the fulfilment of their job responsibilities or prevent an organisation from achieving its objectives.

Our Training Needs Analysis identifies training needs at employee, departmental or organisational level in order to help the organisation to perform effectively. The aim of training needs analysis is to ensure that training addresses existing problems, is tailored to organisational objectives, and is delivered in an effective and cost-efficient manner.

Why

Why is a Training Needs Analysis important?

Training should not be a 'one size fits all' process. RWA understand that each individual will have areas of competence and areas for development.

Identifying training needs will enable the right action to be taken at the right time.

We must not also forget that a robust training plan will ensure that colleagues are competent and fair customer outcomes are delivered!

Conducting a training needs analysis:

One of RWA's experienced trainers will first identify what the individual is required to do or know. When this is compared with how they perform against the company standards/benchmarks, then the gaps should form the basis of any training.

There is also a need to establish 'what good looks like'. There are a number of ways we will do this which will consist of looking at job descriptions, competencies, KPI's, tests, CPD, live observations, etc.

Implementation:

Once the need has been identified and an agreement reached over the way forward, we will go about designing a cost-effective intervention to suit all parties. This could be a major programme, with on-going reviews, 1 day courses or bite sized learning. We will tailor everything to your requirements and deliver a fully bespoke service when needed.

All training will be validated and evaluated in keeping with our desire to be your long-term training partner.

Good for your business and people

Training can improve business performance, profit and staff morale.

Advantages to your business include:

- After consultation with ourselves, you choose what new skills your workforce gains or what existing skills they refresh. We can target skills to meet the needs of your business for now and in the future
- Training your staff can result in better customer service, better work practices and productivity improvements
- As an employer you demonstrate to your workforce that you value them enough to invest in them, improving loyalty and staff retention. In turn, retention is a saving to you.
- Your staff achieve and maintain competence, not only in terms of knowledge but in the effective application of that knowledge



Training has many benefits for your staff:

- They acquire new skills, or refresh existing ones, thereby increasing their contribution to the business and building their self-esteem
- The training they do can take them into other positions within the organization – positions with better prospects and/or better pay
- They're upskilled to do new and different tasks, which keeps them motivated, fresh and of course, competent
- Because they're being trained on your time, they see that you value them enough to invest in them. A good company is seen as one that retrains rather than churns.

Telesales

Are you looking for more sales, better customer experience, more referrals and a more professional reputation? If the telephone is your main point of contact, key techniques need to be embedded. As your business success is inextricably linked to communication competence, this area is vital to get right.

This course is suitable for all staff who engage with customers by phone, in a sales/ service situation. This could be new staff, seeking to understand the key skills and techniques or existing staff who need a refresher.

The course is a one-day workshop with individual and group work, considering the following objectives:

- Capture customer interest and create a wow factor with the decision maker
- Develop high impact questions to keep you on track when making a sale
- Learn the 'hunter-gatherer' approach
- Learn how to "get to" the decision maker
- Understand the importance of effective communication in telesales
- Learn how to capture your clients attention
- Identify techniques for building rapport with customer over telephone
- Understand the importance of adding value to your product or service
- Identify how to present both known and unknown benefits
- Learn a 'killer question'
- Learn sales techniques for closing the deal
- Understanding the types of sales objection you will receive
- Discover how to deal with telephone selling objections effectively
- Learn 3 telesales techniques for 'getting past' the gatekeeper
- Understand the importance of KPIs & tracking for telesales success

This course is suitable for a maximum of 12 delegates.

Management

Those in management and supervisory roles need the knowledge and skills to effectively discharge their duties. This training programme will cover the key areas and prepare them thoroughly for the job ahead.

The management training programme is delivered via a two-day workshop that is very interactive with exercises, group discussion and quizzes with the aim to:

- Develop people management skills to ensure supervisory role success
- Enhance the effectiveness/performance of your team
- Drive the achievement of objectives and results
- Set and reach objectives using delegation and time management skills
- Understand how to overcome barriers to communication
- Motivate, manage and lead your team to meet objectives and deliver results
- Help staff solve problems which lead to under-performance
- Handle difficult situations / people using empathy and constructive feedback
- Effectively supervise individuals you used to work alongside
- Practise the skills of assertiveness and active listening
- Deal more effectively and confidently with difficult behaviours and situations

This course is suitable for a maximum of 14 delegates and is suitable for those who are new to a management or supervisory role or those in need of a refresher.

Following the training, the new managers and supervisors will be equipped to lead groups and teams. Teams will be engaged and motivated, get guidance and feedback to determine performance, which will lead to improved results all round for your business.

Conflict Resolution

Would you like to see stronger relationships, increased problem-solving skills, reduced tension, and increased understanding in the workplace?

It is important for everyone to have conflict resolution techniques. Conflict is sometimes needed to clear the air and there are many positive aspects to conflict if managed properly. As much as you try, you will not be able to avoid every situation that involves conflict, but you can try to resolve conflict without it causing too much damage. Conflict takes its toll on us both mentally and physically so techniques to resolve conflict are vital.

This workshop is delivered over a one-day session, but can be ½ day if necessary. Delegates will:

- Understand the main causes of conflict
- Understand the impact of 'red rag' words and phrases
- Learn techniques to manage conflict professionally and confidently
- Learn conflict management techniques to suit a range of situations
- Avoid the negative impact of conflict
- Master your own emotions in a conflict situation
- Understand the importance of good communication
- Understand the importance of a win/win

This workshop is suitable for a maximum of 12 delegates and can be delivered to staff at all levels.

Vulnerable Customers

Firms have a legal and regulatory responsibility regarding vulnerable customers. Also, it's the right thing to do to demonstrate commitment to your customers.

Vulnerable Customer training will give a better understanding of the customer's individual circumstances (TCF). You will know what indicators to look out for to identify a vulnerable customer and have the confidence to deal with a vulnerable customer.

Other benefits to you include: customer experience, better retention rates and increased reputation of TCF.

The course is delivered via a one-day interactive classroom-based session, with specific case studies, quizzes and role play practices.

As a result of the course, delegates will be able to:

- Clearly articulate the link between Vulnerable Customers & TCF
- Know how your company values link with doing the right thing for customers
- Know what Industry Codes and Practices apply to this area
- Know the VC definition and what detriment is
- Increase your confidence in dealing with different types of Vulnerability
- Define Mental Capacity and how it is dealt with
- Understand how DPA will help you and help customers
- Know how to deal with vulnerable customers once they have been informed

This course is suitable for all those who are involved in meeting customers in the sales/advisory/collections/service processes.

Presentation skills

Would you like to build credibility, reputation and goodwill as well as generate more business and develop a greater understanding of your business?

Not many people can present well but a well prepared and delivered presentation can project confidence, competence and totally engage the audience.

This is a one-day workshop including practice sessions, where amongst other things, delegates will:

- Learn how to prepare effectively
- Understand how to start your presentation
- Understand how to structure your presentation
- Understand the benefit of different media
- How to demonstrate or role-play
- Understand your role in the presentation
- Understand how to close a presentation

This course is suitable for a maximum of 8 delegates, and is aimed at those who make sales and product presentations, want to run effective meetings and those who wish to project themselves professionally to groups, teams, organisations and individuals.

Train the trainer

It is essential to know the fundamentals of developing organisational training programmes focusing on implementing training policy and improving staff competency levels. Delegates will see an increase in their ability to train new and existing staff and will find it invaluable in developing their individual training skills and coaching skills.

Course Objectives:

- Fundamentals for becoming a trainer
- Running a training course
- Delivering a training session successfully
- How to write and structure training
- Factors for effective training skills
- Effective training practice and procedure
- Body language and voice projection skills
- Classroom training versus one-to-one training

This course is suitable for a maximum of 10 delegates and involves one-day workshop with follow up coaching, observation and guidance.

Negotiation skills

Everyone should be a good negotiator. Being able to negotiate effectively helps you reach agreements, achieve objectives, get along better with people, and ultimately be more productive and successful on the job.

This course is typically a one-day interactive workshop with excellent case studies to discuss and learn:

- The principles of negotiation
- The process of negotiation
- 7 ways to improve negotiation
- 7 things to avoid in negotiation
- Planning and preparation
- Types of negotiation
- Main strategies of negotiation

This course is suitable for a maximum number of 12 delegates with a minimum of 4 required.

Delegation

Effective delegation can save you valuable time, achieve more and increase your value as a Leader or Manager.

This is a one-day interactive workshop with the following objectives:

- An understanding of delegation
- Appreciate the tasks which can or cannot be delegated
- Effective delegation
- Evaluate the advantages and disadvantages of delegation
- A planned approach to delegation
- Communicating and delegation
- Choose and use appropriate delegation styles
- Monitor progress and give feedback
- Overcome the barriers to delegation

This course is suitable for a maximum number of 12 delegates who lead a team or manage and supervise individuals.

In addition to the above benefits for you as a Leader or Manager; your team members benefit from improved self-esteem, personal development and job satisfaction whilst the team will become more flexible, efficient and loyal to your business.

Time Management

Effective time management raises awareness of where our time goes and provides the skills necessary to manage time more effectively. This course provides an understanding of the link between behaviour and poor time management, and also provides the skills necessary to delegate effectively and be more assertive towards those who constantly demand our time.

Find out how to plan your time effectively and prioritise the tasks that you have been given. Take some time to think about your mindset towards tasks and stop procrastinating. Learn how to deal with others who steal your time, set expectations and push back when you need to.

This 1 day workshop will cover:

- Setting SMART Goals
- Overcome procrastination
- Differentiate between urgent and important
- Organise your workspace and workflow
- Delegate more efficiently
- Plan your work wisely
- Manage meetings effectively
- Prioritisation

Suitable for people at any level who need to improve their time management approach, or those who are looking for some fresh ideas on how to prioritise work and tasks. Maximum 12 delegates.

Working with customers

Customer service is essential for an organisation if it has to stay in business in the long run. Organisations providing good customer service are successful in retaining existing customers and in building a long term relationship with them.

Training helps customer service personnel to realise the importance of their role and the nature of service that the organisation intends to provide its customers. It is an opportunity for organisations to educate their employees about their mission statement and the role that customer service personnel play in attaining the same.

Customer service training helps employees develop skills to handle customer complaints and in maintaining good relationship with clients.

Typically, this is a one-day workshop for 1-12 delegates which will contain the following objectives:

- Understand customer service
- Meet your customers' expectations
- Customers differentiation
- Effective communication
- Respond to a customer's concerns

This course is ideal for anyone seeking training in customer service and customer care. The majority of delegates attending our customer services courses are in customer facing or customer support roles, who want to develop their customer service skills and behaviours.

Client Money

The FCA want to ensure that all firms are financially viable and continue to adhere to Threshold Condition 4 (Sufficient Resources) at all times so it is important that each firm has adequate, yet proportionate controls to evidence this. Client money is always going to be a prime focus of the regulator and they need to see that the clients' money is fully protected at all times and that you are always adhering to the requirements of CASS. Given that there is evidence of continuing enforcement action for client money breaches, you do not want to be subject to any regulatory intervention in this (or any) area.

Client Money training will increase your knowledge and understanding of CASS requirements. It will also help to reduce the firms risk profile by keeping on the correct side of the regulator.

This is a one-day interactive classroom based learning course with specific case studies, quizzes and role play practices.

It is suitable for all those who are involved in risk transfer, handling and controlling client money.

Assertiveness

A healthy level of assertiveness at the right moments can strengthen your workplace relationships and reduce your long-term stress. Assertiveness is not about learning to reprimand people, with the right training you will see the following benefits:

- Gain self-confidence & self-esteem
- Understand your feelings
- Earn respect from others
- Improve communication
- Create win-win situations
- Improve decision-making skills
- Create honest relationships
- Gain more job satisfaction

This is a classroom based one-day interactive workshop as a result of which, delegates will be able to:

- Identify types of behaviour
- Say 'No' with confidence
- Learn the 'I' assertive behaviour technique
- Identify and know your 'bottom line'
- Learn to create a win/win situation
- Deal with difficult people

This is suitable for a maximum number of 12 delegates and can be delivered to staff of all levels, especially those who lack confidence in their communications.

Complaints

One important aspect of the Financial Conduct Authority (FCA) regulation is that of dealing with Complaints. You are required by the FCA to have a formal, robust complaints handling procedure which needs to:

- Be in writing
- Be available to all prospective and current customers
- Be fully understood by all employees
- Be part of the TCF culture
- Allow further action via the Financial Ombudsman Service (FOS)

Accurate complaint identification will mean that only true complaints will enter the firm's formal complaint handling process. This in return will give a true reflection to the FCA and the public. We must also remember that complaints can be a good thing as it helps to improve processes if dealt with properly which in return will mean your firm will deliver fair customer outcomes.

The course is delivered in a one-day interactive classroom-based session with specific case studies, quizzes and role play practices. As a result of the course, delegates will be able to:

- Setting SMART Goals
- Overcome procrastination quickly and easily
- Recognise the difference between urgent and important
- Organise your workspace and workflow to make better use of time
- Delegate more efficiently
- Plan your work wisely
- Manage meetings more appropriately and effectively
- Understand how to prioritise your time

This course is suitable for all those who work in the financial services sector. Especially those who are involved in meeting customers in the sales/advisory/service processes.

The FCA, TCF and Conduct Risk

Regulation is constantly changing and you must keep on top of regulatory changes at all times. Treating Customer fairly and Conduct Risk must be firmly embedded into the culture of your firm. By demonstrating good regulation, TCF and Conduct Risk it will increase knowledge & understanding, reduce complaints, increase reputation and goodwill.

Delivered via a one-day interactive classroom-based session with specific case studies, quizzes and role play practices. As a result of the course, delegates will be able to:

- Know who the FCA are and how they came about
- Define the FCA objectives
- Appreciate why it is important to keep on the right side of the FCA and the consequences if firms do not abide by the rules
- Be able to describe the FCA principles of business and the FCA approach
- Have more awareness of the FCA sourcebook
- Be able to define TCF and what good looks like
- Be able to describe the customer outcomes
- Be able to define Conduct Risk
- Articulate the close relationship between TCF and Conduct Risk

This course is suitable for all those who work in the financial services sector, including frontline, senior managers and back office staff.

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