

Client Background

Fitzpatrick's Financial Advisers deliver an unmatched quality of financial advisory services to a niche clientele. They offer services in strategic planning, investments, superannuation, estate planning, and asset protection.

Problems and Challenges

- Too much “jargon” was being used in presentations
- Planners were over using PowerPoint slides and visuals
- Presentations of planners were inconsistent - with some presenters being much stronger than others

The Brief/Objectives

Tailor a complete communication and presentation workshop to get all planners “owning the room” when they speak with potential clients and deliver presentations to successfully capture business.

Discover Performance Solution

Research:

- Interviewed planners, clients, directors and target audience members
- Gained a thorough understanding of the information and message that needed to be communicated
- Looked at previous training programs and the results achieved
- Watched presentations delivered by:
 - The average presenter
 - The top presenter
 - The director

Delivery:

From the research, key aspects of focus were identified. Discover Performance developed a customised and comprehensive workshop and workbook focussed around these aspects.

The workshop topics included:

- Demonstrating the value proposition
- Using PowerPoint and visuals effectively
- Channelling nerves into energy
- Developing interactive content sessions
- Filming participants as they deliver their presentations
- Giving direct feedback from facilitators and directors
- Follow-up coaching with individual presenters
- Developing personal action plans to ensure ongoing development.

Results:

The success of the program was measured by:

- Comparing the results with the results of previous training courses
- Conduction anonymous participant questionnaires
- Measuring the increase in client response
- Comparing the recordings of team presentations prior and post workshop
- Revisiting the team 3 months later to re-record their presentations

Following the Discover Performance intervention, participants’ presentations were noticeably more confident, comfortable and compelling. As a result, the sales conversions and client enquiries skyrocketed.

Discover Performance now provides ongoing training to Fitzpatrick's and the Discover Performance approach to presenting has been adopted as part of the induction of new Fitzpatrick's planners.

Words From the Client

“Discover Performance understands how our people need to be with clients. They work with us on an ongoing basis to ensure we achieve a point of difference in a competitive market. It is rare to find that blend of knowledge of our industry with expertise in presenting.”

-Scott Fitzpatrick, Managing Director, Fitzpatrick's QLD