

# CLEAR, CONFIDENT, CREDIBLE ADVISOR

*This is a two day, in-house workshop.*

*Its purpose is to upskill finance team members with the confidence, credibility and skills needed to shift from transactional communication to playing a more assertive, vital and relevant advisory role. As a result, they will be able to complement the industry's technological advances with powerful human value to build substantial trust, respect and buy-in with clients and stakeholders.*

## *Who Will Benefit From This Programme?*

Anyone in finance who:

- Shares information with other parts of the business
- Helps Stakeholders to understand the critical nature of financial information
- Guides Stakeholders how to use the information effectively

And would like to do this more confidently and in a way that ensures positive outcomes.

## **CONTACT US NOW FOR MORE INFORMATION ABOUT THIS INHOUSE WORKSHOP:**

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*This programme is for finance team members to develop their ability to advise the business effectively and add value to financial discussions with their Stakeholders.*



## **KEY OBJECTIVES**

- Develop awareness of personal preferences when communicating to overcome barriers, blind spots and biases in order to provide financial advice from a broad and accurate perspective.
- Create carefully structured messages that have a people focus to achieve trust and overcome emotions, such as uncertainty, stress and fear.
- Master an authentic executive presence, and convey it both face-to-face and virtually.
- Add customised value to each stakeholder by understanding their preferred style and individual needs and advising accordingly.

## **KEY TOPICS**

- Qualities of great influencers and communicators
- Barriers to effectiveness in advisory roles
- Skills to become a credible advisor in the financial industry
  - Manage your state
  - Speak confidently on the spot
  - Create impact with voice and body language
  - Structure the message
  - Respond to reactions
  - Answer unexpected questions
- Making a positive impression virtually and face-to-face
- Gain acceptance in uncertain times
- Understand what the Stakeholders need
- Add value to the business as an advisor

## **WHY THIS WORKSHOP?**

The workshop is highly experiential and allows for personal development across the two days. It has been developed specifically for the Finance Industry, focusing on the changing needs of the business and the new advisory role that staff will need to feel comfortable taking on. Beginning with an advisory activity that is videoed and finishing with another opportunity to advise while being assessed, participants will be able to track their development and leave feeling confident and credible as advisors to the business.

**Your Journey of Enablement and Transformation**

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