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Course Outline

The Organized Sales Assistant

This fast paced course deals with your constantly evolving role as a Sales Assistant. Learn how to get organized, manage multiple priorities, prepare client presentations, assist with prospecting/marketing (mailings, cold calls, seminars), and effectively service your clients. This course would also benefit executive assistants or administrators working with Investment Advisors (IAs) in the financial services industry.

In just 1 day…

- Top tips to manage time, handle pressure, and take your career to the next level.
- Effective client interaction, on the phone and in person.
- Plan ahead for both RRSP and tax season
- Tips for creating prospecting and marketing databases (Outlook and Excel).
- Stressed? Find out how just 10 minutes of planning can save you hours every day.
- Find the time management system that works best for you.

Course Modules

1. **Getting Organized**
2. **Communication Skills**
3. **Multiple Priorities**
4. **Prospecting & Marketing**
5. **Your Changing Role**

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