

Sales Training and FSA Compliance



➤ **What they wanted**

Aon are one of the largest and most respected global insurance brokers. Whether business is outsourced to Aon or marketed under their own brand, the sales and customer experience need to comply with FSA regulations.

Following a visit from a client who outsource their sales call centre to Aon, Aon decided to employ outside trainers to design and deliver a programme which combined high achieving sales performance and FSA compliance. Harding & Yorke successfully pitched for this piece of work.

➤ **What we did**

Initially Harding & Yorke sat side by side with agents and team leaders whilst they were taking sales calls. Focus groups involving management, team leaders and agents were held in order to find out about some of the challenges staff faced. Before putting together the training Harding & Yorke also spent time with the compliance team in order to establish how much of the scripting in calls was necessary.

Once the diagnostics had been concluded Harding & Yorke devised a training programme which focused on turning scripts into conversations and sales closing skills.

➤ **The outcome**

Aon's corporate customer attended one of the training sessions and provided very positive feedback. Sales increased and the lessons learned were incorporated into Aon's induction programme.

Mark Herd – Call Centre Manager

"This training made us think about the way we say things rather than focusing on what we do. It also had the effect of mutually enhancing understanding between sales and compliance."