

DEVELOPING SALES EXCELLENCE FOR PRIVATE BANKERS & CORPORATE RMs


Case Study : —



Challenge

Quintet wanted to strengthen the relationship skills of its client-facing teams working with ultra-high-net-worth (UHNW) clients and commercial organisations. The objective was to equip people to structure and facilitate more consultative client meetings, build trust and develop deeper, more meaningful relationships.

By strengthening these capabilities, Quintet aimed to create greater opportunities to understand clients' wider needs, increase share of wallet and broaden the range of services clients chose to use.

Approach

Working closely with the Executive and Senior client-facing teams, we designed a bespoke programme around the realities of Quintet's client relationships. The content was fully aligned with the organisation's language, processes and values, creating an experience that felt relevant and immediately applicable to participants.

Drawing on Professor David Maister's work on trust, the programme gave client-facing teams a practical framework for building credibility, strengthening relationships and conducting more effective consultative conversations. Real-life client situations were incorporated throughout, enabling participants to apply the approach directly to the opportunities and challenges they encountered with their own clients.

Delivery

Following an initial pilot, the programme was rolled out at scale to approximately 450 UHNW Private Bankers and 250 Corporate Bankers.

To support consistent delivery across Quintet's European operations, we conducted Train-the-Trainer sessions with associates, enabling the programme to be delivered in six languages across eight European countries. Management coaching provided additional support, helping leaders reinforce the approach and embed it within day-to-day client activity.

Outcomes

The programme achieved strong levels of participant satisfaction and, importantly, translated into measurable business results. 95% of participants rated the programme "highly satisfying", while 85% of the client cases practised through the programme subsequently resulted in increased business once the actual customer meetings had taken place.

The use of participants' own client situations encouraged immediate workplace application, connecting learning directly with real commercial opportunities. Delivered across approximately 700 client-facing bankers, the programme provided Quintet with a consistent, trust-based approach to strengthening client conversations and relationships across its European operations.



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we will know a way or create one