

A SALES PROCESS TO ENGENDER TRUST

 **dsw**
Case Study : —

Challenge

Unity Trust Bank needed a unified, customer-centric sales approach that built trust, reflected its ethical values, and unlocked more opportunities with new and existing clients.

With ambitious growth targets set for the next four years, the training was positioned as a crucial driver in achieving those goals.

Approach

In partnership with the client, we developed a **six-step structure** to anchor more consistent, customer-centric conversations.

With **David Maister's Trust Equation** and our **Behavioural Model** underpinning the design, the programme blended skill refinement with new tools and techniques.

A clear embedding plan, including coaching for Regional Directors and a follow-up module, ensured the learning could be translated into everyday practice.

Delivery

Module 1 laid the groundwork with a focus on **trust** and the **behaviours** that shape great customer experiences.

Modules 2 and 3 brought the learning to life: the team mastered our six-step structure, strengthened their listening and questioning skills, learned to manage objections with confidence, and practised asking for referrals.

Real-play assessments and feedback ensured the new behaviours stuck.

Outcomes

The programme delivered strong and consistent results across the complete learning journey:

01 92% overall learning score across the three core modules

02 Participant scores increased throughout the programme, reaching **4.61** out of 5 in the final core module

03 100% of participants identified practical learning they intended to implement in their role

04 97% positive feedback for facilitator expertise, credibility and delivery

05 96% positive feedback on the quality and usefulness of the programme materials

06 93% positive workshop feedback, with no qualitative responses classified as negative



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we will know a way or create one