**AVAILABLE FOR BOOKING - SMART SAVINGS CONVERSATIONS AGENCY & BRANCH**

L&D are offering a second Tranche of this popular virtual learning programme to enhance the onboarding and learning experience for Customer Consultants and their Savings Meetings.

**Who is it for?**

Those colleagues in Branches and Agencies who are nearing or recently completed sign off to conduct Savings Meetings. For example, if someone is conducting role plays in readiness to be signed off.

**Why?**

Following feedback that colleagues are missing a shared experience and variety of perspectives from other new starters through onboarding, which can impact confidence, we are **Reaching** **For Better** with this programme which will encourage network wide collaboration.

Using facilitated Teams sessions to bring colleagues together and interact with their peers during their learning, providing **opportunity to network** with other new Customer Consultants whilst enhancing their skills and knowledge.

**What will Customer Consultants get out of this programme?**

The Smart Savings Conversation programme focuses on **building confidence** together around the ‘Your Savings Meeting’ framework. Collaborating to **explore best practices** in different customer situations, gaining top tips to **enhance their Savings conversation skills**, understand how to be **compliant whilst fully focusing on the customer experience** and avoiding common mistakes.

The programme will enable a Customer Consultant to:

* Self-reflect on their level of confidence in savings meetings and consider areas of strength and development.
* Opportunity to share and identify best practices in their Savings Meetings.
* Share experiences and successes with other Customer Consultants.
* Focus on the customer experience, having great conversations in different circumstances.
* Create a personalised action plan of areas to ensure a customer focussed compliant meeting.

**What is the commitment for the Customer Consultant?**

The learning journey comprises of:

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| **Pre-Course** | Self-Serve in readiness for Session 1, ensuring a completion of ‘Your Savings Meeting Module’ and a self-reflection activity to identify gaps in what they must do and what they want to do differently. |
| **Session One** | A 3½ hour facilitated session on either of the following dates   * **Tue 04th October 13.00 – 16.30** * **Wed 05th October 09.30 - 13.00** * **Wed 12th October 13.00 – 16.30** * **Thu 13th October 09.30 - 13.00** * **Tue 18th October 13.00 – 16.30** |
| **Application** | Embedding activities in the Branch for a suggested period of 3 weeks |
| **Session Two** | A 2½ hour facilitated session on either of the following dates   * **Thu 03rd November 13.30 -16.00** * **Tue 08th November 13.30 -16.00** * **Wed 9th November 09.30 -12.00** * **Tue 15th November 09.30-12.00** * **Wed 16th November 13.30-16.00** |
| **In Branch** | Observation undertaken within two weeks of Session 2  Second observation within one month of Session 2 |

Your newly signed off or trainee Customer Consultant will really benefit from attending the programme in full, **both Sessions must be attended**.

**Your commitment?**

As a reminder, we recommend you discuss this event with your Customer Consultants, to determine if they would like to attend this programme so if they do attend, they are fully aware of ‘the why’ and any objectives for attending can be set at this point.

In between the two sessions we ask that you support your Customer Consultant whilst they apply their learning and carry out customer meetings or role plays.

After Session 2 we ask that two observations are undertaken in the first month and recorded appropriately.

**How do I sign up my Customer Consultant?**

Listed below are the Session dates available. Please reply to this e-mail to let us know your colleagues name and preferred **top 2 choices for both Session 1 and Session 2** making sure they can attend all selected dates. [press this link to reply via e-mail with your choices](mailto:Learning%20Solutions%20%3clearning_solutions@ybs.co.uk%3e)

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| --- | --- | --- | --- | --- | --- | --- |
| **Session No.** | **Date** | **Time** |  | **Session No.** | **Date** | **Time** |
| 1 | Tues 4th Oct | 13.00 - 16.30 |  | A | Thu 3rd Nov | 13.30 - 16.00 |
| 2 | Wed 5th Oct | 09.30 - 13.00 |  | B | Tue 8th Nov | 13.30 - 16.00 |
| 3 | Wed 12th Oct | 13.00 - 16.30 |  | C | Wed 9th Nov | 09.30 - 12.00 |
| 4 | Thu 13th Oct | 09.30 - 13.00 |  | D | Tue 15th Nov | 09.30 - 12.00 |
| 5 | Tue 18th Oct | 13.00 - 16.30 |  | E | Wed 16th Nov | 13.30 - 16.00 |

There is a maximum of 12 consultants per Session and will be booked on a first come, first served basis. If your dates are unavailable due to being fully booked, we will be in touch to offer available spaces on the other dates.

Once we have your response, your Customer Consultant will receive confirmation of the Sessions booked from us with a link to the pre-course workbook, you will be cc’d into this.

**If you have any Customer Consultants not at this stage yet, do not worry, there will be a further event later in the year.**

If you have any queries or wish to discuss the programme please contact me, Ben Harvey. Otherwise to book a place please e-mail [learning\_solutions@ybs.co.uk](mailto:learning_solutions@ybs.co.uk) or follow the link above.

Many thanks,