Our Approach to Consultancy

When providing training or consultancy, the first step is to meet with you and discuss your situation and needs.

We then work with a champion or sponsor to ensure that, in practice, the training/consultancy provided is appropriate and determine how improvements will be measured. This includes determining training and tracking the results.

- T&C audits / T&C Design
- Sales Process Mapping Services
- Project Management

TCF Training

Sales skill assessments / TCF Audits

Bespoke video production for in-company use

Outsource training delivery, e.g. Induction Courses

"Many thanks for your thorough review of the proposals we had for developing our T&C scheme. Your feedback on our proposals together with the further suggestions you made, have enabled us to move forward swiftly in making our scheme more user friendly and aligned to the needs of the business."

Paul Alkins
Head of Strategy and Operations
Co-Operative Bank Financial Advisers

Some Key Business Issues...

Are you under pressure to reduce costs?
All businesses are looking at ways to reduce expenditure without losing quality training provision. Whether this means outsourcing training - in whole or in part - Patterson Group can help.

Can you meet the needs of better trained and more demanding advisers?
As some firms strive to achieve the minimum standards required under T&C, others are demanding increasingly specialist adviser training that adds value. Patterson Group can help with both skills-based training and technical training.

Are your advisers able to produce more and better quality business?
Doing more with less is a modern day fact of life, so how can your advisers work smarter? Do they have the skills, knowledge and confidence to provide advice on a broader range of client needs? Do they have the fact finding skills to enable them to get client buy-in to the range of needs identified? Are they able to develop lasting relationships that lead to repeat sales? Sales processes - help or hindrance?

Do your managers add value to the business process?
If you wonder if there is a better way of managing your business or whether your managers have the skills that make a difference, Patterson Group can provide that edge.

"Training or consultancy should only have two possible objectives; to increase the amount of business sold or improve its quality"