

# Integrating marketing with selling and relationship management

Intermediate/  
Advanced level

Sometimes, those in a central marketing or communications role are left out from the more client facing activities involved in winning new business (selling) and developing existing clients (relationship management). This session provides an introduction to the wide arena of sales and account management – with an emphasis on what works in the professions – and provides tools to equip marketers to increase their contribution to business development success.

This half day course qualifies for 3.5 hours CPD.

## Topics covered

### Introduction

- Differences between marketing, selling, account management and business development
- The role of marketers and fee-earners in selling

### An introduction to selling

- The psychology of selling
- Empathy and needs - The client's point of view
- Sales (buying) cycles
- Popular sales methodologies
- Core selling skills

### New client/business generation

- Targeting different types of clients
- Making contact and promoting dialogue
- Follow up and conversion
- Selling propositions and differentiation
- Pitching and competitive tendering

### Relationship management with referrers and existing clients

- Myths about cross selling
- Relationship management basics
- Using key client plans

### Business development systems

- Plans and targets
- Information and research
- Opportunity and pipeline management
- Measuring effectiveness

### Getting started

## Eligibility

This training course is open solely to member firms of the **PM Forum**, a worldwide group of over 5,000 marketers in professional services firms. Further information can be obtained at [www.pmforum.co.uk](http://www.pmforum.co.uk) or by calling 020 7786 9786.



## Tuesday 8 November 2011

This half-day workshop takes place from 9.00 to 12.30 starting with a light breakfast.

**To facilitate interaction, the workshop is restricted to 18 attendees.**

## Trainer

**Kim Tasso** is an independent consultant with over 20 years' experience of strategic planning, marketing, business development, selling and client management in the professions. Her career started in sales and marketing in the technology sector. After senior in-house roles at Deloitte and Nabarro she started her consultancy in 1994 and has since worked for over 300 firms in legal, accountancy and surveying including: BNP Paribas Real Estate, Colliers CRE, Haysmacintyre, Grant Thornton, Hempsons, Keating Chambers, Olswang, Mayer Brown, Sijberwin, Royds, Stiles Harold Williams, Thomson Snell & Passmore and Weil Gotshal.



She has an honours degree in psychology and is an NLP Practitioner. She has post graduate diplomas in marketing and professional coach/mentoring and an MBA. As a freelance journalist she has had many articles published in marketing, banking, property and legal magazines. *Dynamic Practice Development – Selling Skills and Techniques for the Professions* was published in 2000. She co-wrote *Media relations for property* in 2006 and in 2009 her management book *Growing your property partnership – Plans, people and promotion* was published. She is a frequent lecturer at commercial conferences and was formerly a lecturer on post graduate CIM diploma courses.

Further information at [www.kimtasso.com](http://www.kimtasso.com).

**For more information on other training workshop visit [www.pmforum.co.uk/training](http://www.pmforum.co.uk/training)**

## Fees

First attendee	£195 + VAT
Second attendee	£185 + VAT
All subsequent attendees	£175 + VAT

These prices are only for attendees booked concurrently.

No booking can be confirmed without payment.

The fee includes: continental breakfast • mid-morning tea/coffee  
• folder of workshop material

## Cancellations/Substitutions

Due to the restricted number of places, refundable cancellations are only accepted up to one month prior to the event (a cancellation fee of £25 + VAT will be incurred per person).

Substitutions, however, can be made at any time. PMI reserves the right to cancel with no liability beyond refund of fees paid.

## Venue

Devonshires Solicitors  
30 Finsbury Circus  
London  
EC2M 7DT

## Booking details

Copy the booking form below for any more than three attendees.

For further information contact:

PM Forum  
422 Salisbury House  
London Wall  
London EC2M 5QQ  
Tel: 020 7786 9786  
Fax: 020 7786 9799  
training@pmint.co.uk  
www.pmforum.co.uk

## Integrating marketing with selling - 8 November

Name .....	Name .....	Name .....
Position .....	Position .....	Position .....

Firm ..... Type of firm .....

Address .....

..... Postcode .....

Tel ..... Fax ..... E-mail .....

I enclose a cheque for £..... made payable to *Practice Management International LLP*.

I would like to pay by Visa/Mastercard/Maestro/AmEx (*please circle as appropriate*)

Cardholder name: ..... Amount: £ .....

Card number: ..... Expiry date: .....

Signed ..... Date .....

*Confirmation of booking will be sent by return along with a VAT receipt*

Please return this form to:

**PM Forum, 422 Salisbury House, London Wall, London EC2M 5QQ**

**Tel: 020 7786 9786 Fax: 020 7786 9799 training@pmint.co.uk www.pmforum.co.uk**

