



Sales & Customer Management Advisory Services

IFC's Sales & Customer Management (CM) Advisory Services help banks to optimize their business development efforts and capitalize on effective customer management activities throughout the clients' life cycle.

What we offer

- Business development strategy
- Sales organizational models, multichannel sales & distribution solutions
- Sales leadership development
- Sales force capacity building via soft skills training programs
- Customer value proposition to establish a distinctive and sustainable competitive advantage
- Target setting and allocation methodology
- Incentive schemes and reward/recognition programs
- Customer management policy
- Customer experience/need based approach to servicing
- Marketing strategic options
- Product programs to accelerate business development
- Account reactivation plan

Why sales & CM for banks?

- Frontline staff will be better equipped to assess client needs and offer the proper financial solutions
- Enhanced sales productivity and revenue generation
- Improved cross and upsell ratios
- Competitive differentiation to gain market share
- Sales/service model aligned with client value
- Improved people development and coaching abilities of sales leaders
- Effective performance management and assessment
- Proactive client engagement protocol, reduced client attrition
- Higher frontline motivation and stronger commitment level



Why IFC?

We are the largest global development institution focused on the private sector, operating in over 100 countries and offering:

- More than 60 years' experience in unlocking private investment, creating markets & opportunities where they are needed most
- Over 700 corporate clients, 900 financial institutions in 120 countries, most using a mix of IFC Investment & Advisory services
- More than 700 Advisory projects in 100 countries
- One of the largest teams of SME finance specialists, bringing global & local expertise to client banks
- Successful implementation of sales & customer-management advisory projects
- Support for clients with investment products, to grow banks' SME businesses & reduce concerns about risk
- Products include risk-sharing facilities, credit lines, credit insurance, supplier finance & trade-finance products (e.g., LCs, LGs & trade guarantees)