

First Creation Consulting



Business Development Skills

***Case Study
Retail Client***

***Neptune Managers
(Asset Manager)***

***Salesperson Brief
(BWI Asset Managers)***

First Creation Consulting Ltd

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Situation

You are a Sales Manager for BWI Asset Management

After months of trying you have secured an appointment with the Private Client Manager for Neptune Managers based in Liverpool.

Neptune is a large Discretionary Asset Manager. They construct portfolios for their clients based on their individual needs, but buy from a specific panel.

Background

The Private Client Manager is responsible for deciding which products are added to the panel.

It is known in the market place that Neptune do not recommend funds that are not on their panel, it is therefore vital to get onto the panel.

Your firm does not currently have a relationship with Neptune or any funds on their panel.

Average deal size £60-70K invested in overseas equities

Meeting Brief

Please prepare to meet with the Private Client Manager.

Your objectives for the meeting are to:

- Introduce yourself & BWI. Build rapport and credibility in the BWI brand.
- Identify if they have any 'gaps' in their investment panels where you could introduce your products
- Gain commitment to a follow up meeting

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**Neptune Managers
(Asset Manager)**

Client Brief

Situation

You are a discretionary Asset Manager for Neptune Managers based in Liverpool

BWI Asset Management has been chasing you for months in order to arrange a meeting to come in and see you.

Having put them off for the last few months in a moment of weakness you reluctantly agree to a meeting with the Sales Manager.

Whilst you are not negative towards BWI you do not believe that they have any more to offer than you current providers and you have enough of them.

Background

You have recently rationalised your client's portfolios and are looking for a well diversified investment to give them gentle exposure to all equity markets, but without too much risk for all their lower net worth clients, below 100K portfolios.

You are aware of risk given a few years of poor performance and want something to be a safe pair of hands, with good diversification, but that can achieve good performance for an investor who is not risk adverse.

In summary you are keen to find new investment opportunities that offer:

- Well managed risk
- Good diversification
- Good performance

Meeting Brief

Please prepare to meet with the representative from BWI.

Please respond to any questions asked providing the relevant information; however please do not be too forth coming with information if not asked.