

Bespoke enablement for product-oriented advisors

ABOUT UNICREDIT:

UniCredit are a European commercial bank offering personal and corporate banking, investment banking, asset management, and financial advisory services.

COMPANY SIZE:

10,001+ employees

INDUSTRY:

Banking

SBR SERVICES:

Sales enablement, sales performance, sales training, sales coaching

What comes to mind when you think of SBR?

“For me, it’s the level of professionalism, creativity, the bespoke work and level of communication.”

Why did you choose SBR?

“We spent a lot some time looking for a partner. We liked that SBR knew what we wanted from the beginning. They didn’t just turn up and say, “We have a solution for you,” without even asking who we are or what we should expect. They asked a lot of questions. We liked that SBR developed a programme that was unique to us. They gave a basic structure, and then adapted that structure to our needs. We liked the proactive, curious, and inquisitive approach.”

What were your major needs?

“For a long time, we lacked special training for our product-oriented advisors who sell their products primarily through a network of advisors in the bank.”

How did you collaborate with SBR?

“It was a comprehensive block of various training sessions, shadowing, analysis, and multiple follow-ups. It was different from the classical training style where you’d simply go to a room and spend the whole day listening. Then the next day you leave, that’s the end, and the curtain falls. With SBR the training was structured in such a bespoke way to us: some things were repeated, some things were added, and we liked that members of the SBR team stayed with our people until it was embedded in their behaviours. Now it’s up to us to continue to encourage our people and make sure these habits and behaviours are kept.”

What makes SBR stand out from their competitors?

“When I was observing the sessions, our people were speaking most of the time. SBR moderated the discussions, which I think is very important, so our people talking during the course figure things out themselves, instead of what the coach simply tells them. That was a big success.”

What was the feedback like?

“Everyone I asked said that the training was unique, original, and extremely enjoyable. This was a starting point for further discussions with SBR. Management programmes were added to this, and after observing how SBR approached this, we came up with coaching for the managers as well.”

What do you value most about your collaboration?

“They teach us what they do themselves, which is important to us. There are many practitioners who can’t deliver, especially when you lead cross-border teams as SBR do. SBR can deliver not only regionally but also across the globe.”



“We will continue to develop and work with SBR for the long-term. We’re continually improving the programme: adding new things and removing things. We want this because we want long-term growth. SBR are now familiar with our jargon, which is sometimes very technical. We use a lot of abbreviations. Our speech is derived from the systems we use and SBR use our jargon in their presentations, so our salespeople and our client managers felt more comfortable and understood the material better. In the demonstrations SBR used our actual cases where possible. This was very much appreciated and helped our people a lot.”

Jiří Flégl

CEO



For me, it's the level of professionalism, creativity,

Jiří Flégl

CEO - UniCredit Factoring Czech Republic & Slovakia, a.s.

Head of Structured Trade & Export Finance - UniCredit Bank Czech Republic & Slovakia, a.s