ICC Academy

Trade Finance

Managing Trade Sales

Author: Michael Mckenzie

GET STARTED

Level 2

Duration 5 learning hours

Language English

Price US$200

Credits 5

Credits category CTFP Elective Course

Course code TF 201-8

Target audience

General practitioners working in banks, corporates, or financial institutions in functions such as Relationship Management, Credit, Compliance, etc. but with an interest in trade finance.

Course objectives

This course will help you gain an understanding of how to align your sales organization and staffing model to your bank's business strategy, target customer markets and sales coverage process. You will also cover best practices in trade finance revenue attribution and the complexities of measuring sales performance and customer revenue contribution with special attention to key considerations and strategies for customer selection, growth and retention.

Additionally, this course will explain how to establish a sales process and develop metrics and objectives consistent with your desired business results and the necessary elements of developing and training a successful sales team.

Course outline

Lesson 1 Organising and Staffing Trade Sales

Lesson 2 Revenue Recognition & Reporting

Lesson 3 Customer selection, acquisition, growth and retention

Lesson 4 Sales Process and Metrics

Lesson 5 Building a successful sales team

Lesson 6 Case Study

Assessment

This eLearning course will include a self-assessment tool to help you prepare for the Certified Trade Finance Practitioner (CTFP) Final Examination if you choose to obtain this Certificate. The passing grade for the Final Examination is set at 70%.

What is an ICC Academy online course?

ICC Academy courses are delivered via our Learning Management System (LMS) using innovative tools for combining digital learning with industry-centric community discussions.

Our courses are available for purchase individually or as pre-designed packages (ie: Certificates) and are delivered exclusively online. They include videos, animations, case studies, and a self-assessment section and are available to take at any time—anywhere in the world.

Michael Mckenzie

Senior Partner, ansrsource

Michael McKenzie has over 30 years of experience in international banking and financial services sales. He retired from JP Morgan in 2014 after 18 years with the firm. He recently joined ansrsource, a learning design company, as a senior partner. In the course of his career, Mr. McKenzie has held positions that included:

- Global Head of Network Trade
- Regional Head of Latin America for Treasury andt Securities Services
- Global Head of Trade Sale

His expertise incorporates:

- Global sales management including the development of sales strategy, resource allocation and compensation plans; the recruitment, retention and development of sales and support personnel, and the leadership of multi-product cross-regional client planning and sales teams.
- Client engagement with extensive experience advising mid & large cap companies across a variety of industry segments on international trade, cash and liquidity management with a focus on working capital maximization and risk mitigation.

Mr McKenzie has served numerous terms on the board of the Banker's Association for Finance and Trade (BAFT) and he was the organization's President and Board Chair in 2000-2001.