Chris Unwin

Specialist trainer: risk advice & sales training

Chris Unwin is a specialist sales trainer with a flair for direct communication and an impressive ability to deliver key messages surrounding corporate strategy and sales skills.

Chris has worked in the finance industry for over thirty years as a financial adviser, team manager and Director of Training to a large dealer group.

Chris Unwin maintains his hands on involvement in the finance industry as a specialist adviser in the area of risk. He is regularly engaged to deliver workshops and training sessions on risk advice engagement skills and generic sales/communication skills.

More about Chris Unwin:

Chris Unwin graduated from Oxford University with a law degree in July 1977, and by November 1978 was working as a commission only life insurance broker in the City of London.

Over the next 10 years he built a personal client base of around 400 clients and recruited, trained, motivated and managed a team of 14 brokers from scratch.

In 1989, the company Chris worked for in the UK opened an office in Sydney and asked for volunteers to set it up and run it. Chris was one of 12 brokers to take up the challenge. Between May 1989 and December 1990 the team recruited approximately 150 brand new financial advisers, most of whom had no experience in sales or financial services. The team needed training and Chris volunteered for the task. As a result, from the early 90s, he designed and delivered numerous training courses – initially for new advisers in the area of generic sales/communication skills, and then more advanced courses in the same area for more experienced advisers. Over time, he also began to specialise in the risk advice area, and developed more specialised training programmes around the risk advice process, still focusing primarily on engagement skills, and also helping financial planners to understand better the role of protection in a financial plan and how to position it with clients.

By 2004, Chris had become a Director of Training in a large dealer group and he felt that he'd fallen back in the corporate mould he had jumped from some 25 years ago. He decided to go back to doing the two things he had discovered he had the most passion for, namely helping clients with their personal protection requirements and helping financial advisers do a better job for their clients.

Chris' consulting business has now been operating for over six years and has proved most beneficial for thousands of financial advisers, mortgage brokers, and retail sales consultants, to the point that it now takes up most of my time. However, he maintain a role as a specialist risk adviser for his personal clients.

Chris Unwin speaks about:

Chris Unwin trains and speaks on risk advice specific engagement skills and generic sales/communication skills and can tailor his presentations /workshops to meet corporate needs. Examples of his topics include:

Risk Advice Specific Topics

- End to End Risk Advice Process (Full Day)
- Elements of the Risk Advice Process (45 minutes +)
- The Miracle of Trauma Cover (1-3 hours)
- Client Engagement Process for Trauma Cover (1-3 hours)
- Working More Effectively with Centres of Influence (1 hour)
- Establishing your "USP" – Quality of Service
- Proper Protection – The Foundation Stone of a Financial Plan (45-90 minutes)

Generic Sales/Communication Skills

- Sales Success Strategies (Full Day)
- Telephone Technique – Golden Rules (1 hour)
- Do's & Don'ts of Client Meetings (1-2 hours)
- Handling Objections (1 hour)
- Building Blocks of Closing Business (1 hour)
- Asking for and Getting Referrals (1-2 hours)
- The Importance of Attitude (1 hour)
- Setting & Achieving Goals (1 hour)
- Habits for Success (1 hour)

Client testimonials

" They say you are never too old to learn and yesterday proved that all over again. Your workshop was informative, refreshing, and great 'opportunity cost'. I came away so enthused that I have already sat down to implement much of your fact file and presentation methods into my own practice (this after some 20+ years in my own practice).It was fantastic!

- Peter Hartnell - Financial Adviser, Melbourne

" I have been involved in the Life Insurance business since 1983 and have attended workshops and seminars on a regular basis, but it has been a long time since I have benefited from so much knowledge, ideas and enthusiasm compressed into your one day workshop. The concepts and ideas are equally relevant in simple "Mum and Dad" situations as well as the most complex cases in Business Insurance that we encounter in our profession. I recommend that any adviser, both established or new to our industry, attend any future workshops that you run. In addition, I believe that all Life Offices should assist you in "spreading the message" to the benefit of all.

- Alex Braun - Qualifying Member Million Dollar Round Table, Melbourne

" Your presentation was enlightening, educational and entertaining. Accountants are often good with the technical side of financial planning, but leave a lot to be desired when it comes to the art of selling, or closing the deal. It is in this area where I believe I need to improve and where I found your presentation so enlightening.

- Brett Verrender - Senior Accountant , Coonabarabran, NSW

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