

What does it take to succeed as a sales rep in the financial sector?

That's what our O/I psychologists wanted to know. They talked with sales experts in the finance industry and combined behavioral science with their insights.

Here are our results.



Being a successful sales expert in the finance industry revolves around 4 pillars:

Enterprising

Successful sales reps in the financial industry are proactive and do not need external demand to get things going. Confident in their abilities to achieve their goals, they are highly efficient and energetic.

Driving financial success

They are financially acute, focused on the bottom line and evaluate activities based on the costs/benefits. When facing a challenge, they work harder to pursue their goal: maximizing profitability for all parties.

Making needs-based recommendations

They provide recommendations according to what's best aligned with their clients' needs. They analyze situations rigorously and can easily evaluate the consequential implications of decisions. They're persuasive and focused on achieving win-win scenarios to close more sales.

Nurturing relationships

They are client-centric, so they establish rapport with others easily. They have a natural desire to guide others in the right direction and are recognized as a reliable source. Their charisma and gregarious style leave a lasting impression, even after brief encounters.

