

# Management Development Program

## Sales and Distribution Strategies for Financial Services



**Financial services firm launches a new product with strong features and competitive pricing.**

**Yet months later, sales remain far below expectations.**

### Changing Market Trends and Consumer Behavior

In financial services, strong growth increasingly now depends on how effectively institutions design and manage sales channels across agents, partners, digital platforms, and ecosystems.

Customer behaviour is evolving rapidly as digital adoption accelerates across banking, insurance, and wealth management.

**The market is moving toward hybrid distribution models.**

“Digital technologies are reshaping how financial services firms interact with customers and deliver products.”

The businesses that succeed will be those that integrate digital channels, advisory networks, analytics, and personalized customer journeys into a coherent and scalable distribution strategy.

**Source: Excerpts from World Economic Forum Report, 2026**

### About This Program

McKinsey & Company reports that financial institutions leveraging advanced analytics in sales and distribution achieve 15–20% higher productivity and revenue uplift. Deloitte's latest digital banking research indicates that over 70% of financial services interactions are now digitally influenced, reshaping traditional distribution models. As India's financial services sector continues its rapid expansion, data-driven, omni-channel sales capability is emerging as a primary driver of competitive advantage.

This programme is designed for business leaders, sales managers, distribution heads, and strategy professionals within financial services who seek to accelerate revenue growth and enhance channel productivity. It focuses on redesigning multi-channel distribution architectures, integrating digital and physical sales strategies, strengthening data-driven sales decision frameworks, and enhancing customer lifetime value. Through case discussions, simulations, industry benchmarks, and practical frameworks, participants move from conceptual understanding to actionable sales transformation strategies.

### What Will You Learn

1. Understand evolving sales models in BFSI
2. Design high-performance distribution networks
3. Develop customer acquisition and retention strategies
4. Build cross-selling and up-selling frameworks
5. Optimize channel partner management systems
6. Leverage analytics and CRM for revenue growth
7. Align sales strategy with regulatory compliance

## Program Leaders



**Prof. S. B. Subramaniam**  
**Chartered Accountant**  
**(Fellow Member of ICAI)**

Over three decades of experience as CFO / Head of Finance in leading Indian and multinational organisations. Combines highly extensive corporate leadership experience with consulting in business finance and mentor business managers to drive financial discipline and sustainable growth.



**Prof. Abhishek Sinha**  
**B.E (NIT, Rourkela),**  
**PGDM (SCMHRD, Pune)**

Over 20 years of rich industry-wide experience. Senior leadership roles in reputed organizations like Samsung Electronics, Madura Coats, Akzo Nobel, and Aircel. Consulted for start-ups in health-tech and consumer durables.



**Dr. Nitin S. Tupe**  
**PhD, Industrial Systems**  
**MBA IT system,**  
**BE Mechanical**

With over 23 years of international and domestic industrial experience, he has a strong foundation in SCM strategy, and automation across FMCG, e-commerce and other sectors.

## Program Content Details

**Module 1:** Financial Services Sales Landscape

**Module 2:** Designing Distribution Architecture

**Module 3:** Sales Force Effectiveness

**Module 4:** Customer Acquisition & Lifecycle Management

**Module 5:** Digital & Omni-Channel Strategy

**Module 6:** Channel Partner & Alliance Management

**Module 7:** Revenue Analytics & Performance Dashboards

**Module 8:** Capstone Simulation

## Program Benefits

- **Lower Customer Acquisition Cost:** Design efficient sales and distribution strategies that optimize marketing spend and improve acquisition efficiency.
- **Scalable & Profitable Distribution:** Build multi-channel distribution models that drive sustainable growth and long-term profitability.
- **Higher Sales Productivity:** Improve sales force effectiveness, conversion ratios, and overall revenue performance.
- **Enhanced Cross-Selling & Wallet Share:** Strengthen customer lifecycle management to maximize cross-selling opportunities and increase customer value.

## Learning Process and Style

The approach is highly interactive, practical, and application-oriented, ensuring immediate implementation in participants' organizations.

The program will be delivered through :

- Case studies from Banking, Insurance, NBFC, and FinTech sectors
- Industry benchmarking exercises
- Role-play simulations and sales scenarios
- Sales funnel analysis workshops
- Group discussions and peer learning
- Capstone strategy presentation

## Who Should Attend

- Marketing, Product, and Strategy leaders driving growth in financial services
- Sales, Territory, and Business Development managers leading distribution performance
- Relationship, Wealth, Insurance, and Investment professionals managing client portfolios
- CX, CRM, and Customer Analytics leaders focused on lifecycle value and engagement
- Digital Banking, FinTech, and Growth managers driving acquisition and digital transformation

**Select sessions would be conducted by industry experts from BFSI industry and global academicians.**