04

CONSULTANCIES

AURORA TRAINING

WHY YOU NEED OUR PROGRAMMES

Do you sell to Financial Services companies but struggle to effectively tailor your message?

–

As an organization, your teams understand your product but don't understand the banking landscape?

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Do your teams fully understand the different banking personas (CEO, COO, CFO, CTO), their agendas and motivations and the questions they ask?

–

Do your Research and Development teams need a better understanding of banking and banking products?

Have your sales team asked for help with their pitches so they can compete better and win more?

–

Do you need experiential FS-focused training to help drive specific behavioural traits and effective use of language?

–

Do you want to expose your professional services' teams to C-suite professionals/budget owners to better understand language and buying patterns?

–

Do you understand the structure and functions of a bank?

AURORA

We don't operate like a normal consultancy, we focus on honest advice, using real-life examples and experience to drive real value.

JIWAN LALY
Managing Partner

YOUR BUSINESS GOALS, OUR BUSINESS KNOWLEDGE

We're a London-based boutique consultancy with global reach.
–
With decades of real life business and technology expertise, we're by your side to help shape and deliver your biggest business ideas.
–
Former Financial Services leaders rather than consultants, with decades of experience across all customer segments and spanning functions including COO, Strategy, Technology, Change Delivery, Sales and Risk
–
We help businesses shape their strategic vision by partnering to define their future – Mission, Objectives, Values, Culture and Operational Leadership.
–
We deliver change across technology, process, operations, and people applying rigorous governance, planning and structure.
–
Our team combined with the latest strategy and technology tools can help shape and deliver your biggest business ideas effectively.

"What I get when I speak to the Aurora team is experience, pragmatism and solutions. They never come across as consultants, more like experienced colleagues or mentors."
–
GLOBAL COO
Tier 1 Investment Bank

WHY WORK WITH AURORA?

"Leveraging our experience as senior industry veterans, we help share knowledge from large and complex businesses to help transform how our customers work."

SEAN VICKERS
Managing Partner

Teams equipped with critical financial services knowledge holistically across banking & banking operations

–

Credibility in discussion with customers, using their language and context, examples and identifying with their concerns

–

Not focused on the solution but specifically on financial services

–

Increased efficiency through effective scoping, positioning , dialogue and governance

–

Teams equipped to proactively engage and consult with senior client stakeholders allowing them to respond to client demands and 'speak the language of the Bankers'

–

Teams equipped with facilitation 'hints and tips' and practical experience to apply to real-life scenarios

–

A stronger more coherent workforce aligned to the goals and strategy of the client

ORGANISATIONAL OUTCOMES

OUR EXPERIENCE

THE BIG FOUR CONSULTANCIES

Strategic partner to global consultancies, providing deep industry knowledge to help shape the way you engage with Financial Institutions

–

Leveraging our experience as senior industry veterans, we help share knowledge from large and complex businesses to help transform how our customers work

–

We have engaged and appointed Tier 1 and Tier 2 consultancies, working directly with EY, PwC, Accenture, Deloitte, Capco, Genpact and Virtusa to name a few

–

Through RFI and RFP processes we have seen these organisations structure their pitch and shape their delivery to ensure success. We have also been part of deal pursuit teams more recently through Aurora

> **Aurora is a very strong KYC / Client Lifecycle Management boutique, who we are keen to partner with in the UK**
>
> –
>
> **SENIOR PARTNER**
> Top 4 Consultancy

INVESTMENT BANKING EXPERIENCE

Former Financial Services leaders rather than consultants, with decades of experience across all customer segments and spanning functions including COO, Strategy, Technology, Change Delivery, Sales and Risk

–

Trusted advisor, applying decades of senior industry expertise to drive critical operating model changes, transformation initiatives and technology implementation.

–

Large-scale experience with enterprise level technology in multinational organisations, from vendor assessment and qualification, through to implementation and post-delivery assessment

–

Deep domain knowledge of regulation and control requirements, managing large operations and stringent regulatory requirements

HOW THE AURORA TEAM HAS HELPED

01 Truly understanding the competition, their strengths, their weaknesses and how to compete and win

–

02 Aligning objectives and agreeing onboarding principles

–

03 Understanding your clients' objectives and agreeing a common direction

–

04 Driving confidence in your Sales people so they can compete and win against the big four

05 Establishing common language when talking to the client about what they do, the problems they face and the structure of their organisation

–

06 How to be more strategic and less transactional. Active listening to correctly identify customer direction and needs, elevating the dialogue

–

07 Using executive coaching techniques to build confidence, provide a 'sandbox' to try out ideas and improve pitch, language, tone, behaviour and style

> **The Aurora team bring deep Financial Services and customer insight to the table, along with a wealth of practical knowledge around operating models, the regulatory environment and risk.**
>
> –
>
> **DIRECTOR**
> Strategy, Reg-Tech Vendor

COMPELLING OUTCOMES

01

Whether you want an established course delivered at a venue of your choice, or an entirely new training package crafted to your specific needs, Aurora's training can help your organisation meet new challenges and address the knowledge and skill gaps in your workforce.

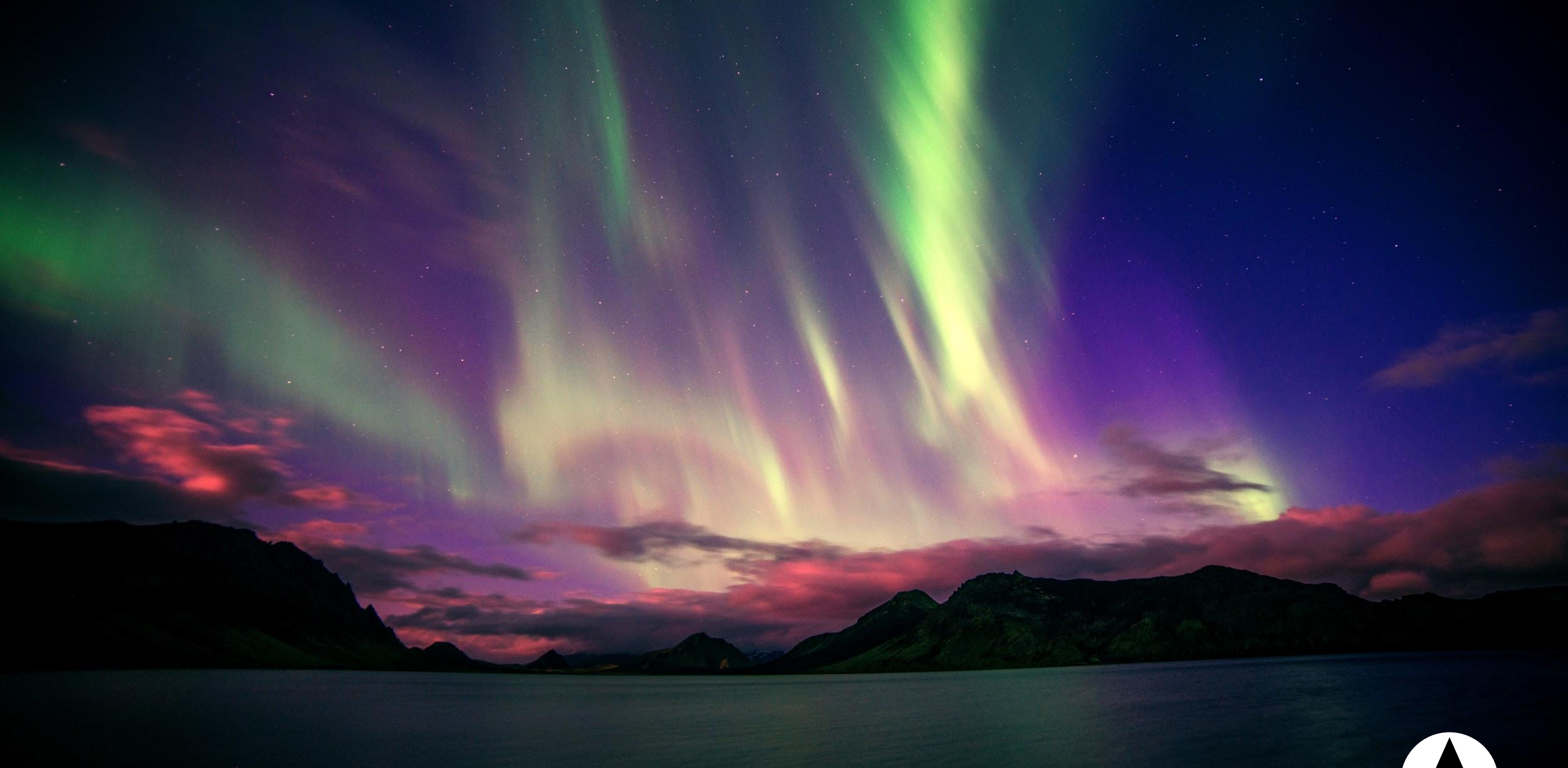
02

We design custom, dynamic learning solutions to increase performance within your organisation. Like any bespoke training, your learning solution should suit your organization and your team perfectly.

03

Let us take the hassle out of training with our team of industry veterans who will manage everything from start to finish, ensuring minimal disruption and delivering excellent results. Catering to audiences of all sizes or providing invaluable one-to-one executive coaching.

BESPOKE SOLUTIONS



DEFINED TRAINING SOLUTIONS

AURORA

A

Two-day Banking Masterclass that talks holistically and laterally across all elements of banking and banking operations. This is not focused on a specific technology solution or industry but on true banking sector knowledge, following the crisis in 2008.

OUTCOMES FOR YOU

01 Teams equipped with critical banking background and knowledge that talks holistically across all elements of banking & banking operations

–

02 Credibility in discussion with customers, using their language, examples and identifying with their concerns

–

03 This is not focused on the product solution but specifically on educating on the banking domain

–

04 Increased efficiency through effective positioning, scoping and discussion

OUTCOMES FOR YOUR TEAM

01 Exposure to ex-Financial Services professionals with real life experience in banking, onboarding and CLM

–

02 A new critical introduction to training curriculum addressing banking and the banking ecosystem

–

03 A comprehensive programme that within a succinct and crisp time window elevates knowledge and experience with the banking industry

–

04 Confidence in talking to banks, being able to cite examples in discussions and convey greater knowledge and credibility

02 DAYS

02 MODULES

TIMEFRAME & FORMAT
Two days / Classroom

AUDIENCE
FinTech / RegTech Professionals
Banking Analysts
Newly appointed Consultants

MODULE 01
The Banking Environment
Bank Operating Models
The Financial Crisis
The Regulatory Environment
Addressing Financial Crime Risk
The Evolution of CLM
Banking Personas

MODULE 02
Banking Functions & Controls
Banking Operations
AML & KYC
Risk Ratings & FATF
Regulations
Data
Banking Products

BANKING MASTERCLASS

B

One-day R&D-specific training programme targeted at exposing the team to key elements of onboarding methodology, the way the client thinks, their buying trends based on pain points in the industry and the ability to push back on cumbersome or extraneous requirements.

OUTCOMES FOR YOU

R&D professionals with a much clearer sense of context of their product and the key drivers and focus for Financial Services. Allowing them to:

–

01 More quickly and effectively react to requests to change the application

–

02 Be able to suggest more cost/time-effective development solutions for business problems

–

03 Provide contextual push-back on requirements where solutions/alternatives already exist within the application

–

04 Potential for R&D professionals to be client-facing to develop specific solutions, reducing documentation/translation effort
Ability for technical staff to talk the same language as the solutions consultants and ultimately the customer

OUTCOMES FOR THE INDIVIDUAL

01 Having a more complete understanding of the industry and the challenges your solution solves for Financial Institutions

–

02 Greater engagement in the development process through ability to contribute relevant ideas in the right language

–

03 Increased comfort in discussing and contextualising requests for changes/new functionality

–

03 Empowered to ensure that the right solution is sought rather than solely working to detailed functional specifications

–

05 Exposure to former clients and ability to resolve industry questions and sandbox ideas
Greater understanding of the sales/development cycle and the pressure exerted by clients

01 DAY

01 MODULE

TIMEFRAME & FORMAT
One Day / Classroom

AUDIENCE
FinTech / RegTech Professionals
Research and Development Teams

MODULE 01
Introduction and Background to Financial Services
Key Challenges – CLM & KYC
Vendor Value & Differences
Developing Principles
Pushing Back
Consolidation

BANKING FOR TECH PROFESSIONALS

C

One-day training programme targeted at understanding the competition, their strengths, their weaknesses and how to compete and win. Individual pitch coaching and ideas testing to improve tone, language, behaviour, and style. Providing a safe environment for developing ideas and building confidence.

OUTCOMES FOR YOU

01 The team is equipped to proactively engage and consult with senior client stakeholders allowing them to respond to client demands and 'speak the language of the Bankers'

–

02 Gains in confidence, empathy and tenacity as well as self-belief that the team can compete against the perceived strength of the Big 4

–

03 A stronger more coherent workforce aligned to your goals and USP

–

04 A facilitated session that drives industry knowledge around your competitors designed to drive confidence in your team(s) that they have the ambition and right to win when they pitch

–

05 Feedback on the strength and ongoing development needs of the team

OUTCOMES FOR THE INDIVIDUAL

01 Behaviour and approach…articulating how the competition sell and how to rework the pitch for greater success

–

02 How to be more strategic and less transactional

–

03 Assess their client pipeline against the sales cycle, providing key advice about how language and tone changes as the pitch progresses

–

04 How to bring senior stakeholders to alignment around their objectives including a facilitation guide for use in their day-to-day meetings

–

05 Define the habits that will enable the team to achieve their goals and targets, elevated by: speaking their language; acting with confidence, commitment and courage; relationship building; 100% client focus; responsive and attentive

01 DAY

01 MODULE

TIMEFRAME & FORMAT
One Day / Classroom

AUDIENCE
FinTech / RegTech Professionals
Research and Development Teams

MODULE 01
Introduction and Background to Financial Services
Key Challenges – CLM & KYC
Vendor Value & Differences
Developing Principles
Pushing Back
Consolidation

PITCHING & COACHING

D

One-day experiential programme, to equip your client-facing teams with the skills to effectively consult, engage and challenge senior bank stakeholders, throughout the project lifecycle.

OUTCOMES FOR YOU

By the end of the workshop, participants will be able to:

–

01 Use a set of standard artefacts to agree the structure, products and processes of the client organisation and the language the client uses to describe these

–

02 Set and describe scope from a client perspective while being able to challenge from a product provider point of view

–

03 Bring senior stakeholders to alignment around their objectives through practising the key engagement behaviours of rapport building, curiosity, confidence and tenacity

–

04 Proactively engage and consult with senior client stakeholders allowing them to respond to client demands and 'speak the language of the Bankers'

–

05 Use Aurora tools to keep the client honest and keep the project on track

OUTCOMES FOR THE INDIVIDUAL

01 Purpose and Objectives provide the skills, tools and conviction to agree and align the clients objectives for the initial and longer term project. Confidence to hold the client to their defined Principles

–

02 Building a Team Charter Facilitation simulation to establish shared ways of working with the Client and understand the business drivers of COO/CIO

–

03 Operating Principles Simulation to establish an agreed set of 'technical' principles that both you and the Client will work to throughout the project and prioritise, however using the language of the COO/CIO rather than your internal product language

–

04 Aligning Language Simulation to establish a common set of language and understand the structure of the clients organization

–

05 Aligning Scope Follow-on exercise to define and align scope using Aurora tools, ensuring the Client's buy-in

01 DAY

01 MODULE

TIMEFRAME & FORMAT
One Day / Classroom / Role Play

AUDIENCE
Sales Professionals
Analysts and Associates
Product Consultants

MODULE 01
The Banking Environment
The Regulatory Landscape
The Evolution of CLM
Role Play #1: Setting the tone
Role Play #2: The SteerCo
Role Play #3: Global stakeholders

THE CLIENT JOURNEY