

Margolis Advisory Group announces a unique Sales Presentation Skills Learning Program
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Margolis Advisory Group now provides a customized sales presentation skills program for the investment management industry. Our unique approach combines the industry, content, and messaging knowledge and experience of Jeff Margolis with the presentation skills, experience and techniques of John Epstein, a sales and presentation skills expert. This singular combination of expertise provides a differentiated service which leads to transformative improvements in presentation effectiveness.

After a full career as an operating executive in the asset management business, Jeff Margolis has consulted to asset management firms for the past nine years on a variety of aspects of growing and managing their businesses, with an emphasis on marketing, business development, product management, and client management. John Epstein advises a diverse group of clients on how to present and sell more effectively, having previously been a global training leader at Nielsen.

Jeff and John's approach is highly customized depending on the needs of their client, its size, staff, and products. In the case of one client, Boston Advisors, senior management, sales, and portfolio management personnel participated in an intensive full day learning program which led to an improvement in proficiency. Follow-up work also improved the effectiveness of the presentation material. Boston Advisors Chief Marketing Officer, Peter Anderson, remarked "Jeff and John bring together a unique combination of objective skills-based presentation training with the insights of a seasoned practitioner. This provided us with a constructive institutionally-focused session, improving not only the delivery of the message but, importantly, the message itself."

Please contact us for more detail about this unique new service and how it can be customized to your organization.

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