



...Working in banking, insurance and finance

Who would have thought, two years ago, that General Motors and Chrysler would be in bankruptcy, that Lehman Brothers would disappear, and that banks and financial institutions all over the world would be faced with unprecedented problems of confidence? Who would have predicted the need for governments to issue guarantees to Australian and New Zealand banks? And who, in 2006, would have predicted major unemployment and lack of confidence through most sectors of the world economy?

At the same time, Australia has faced natural disasters on a scale never before seen. Raging storms in Brisbane with recurrent floods in North Queensland and New South Wales, and devastating droughts in other parts have been dwarfed by the Victorian bushfires- Australia's worst ever disaster.

This has meant massive and sustained pressure on banks, insurance companies and organisations working in the financial services and financial planning industries. Companies in these sectors are facing unpredictable and huge challenges for which there seem to be no precedent.

All companies are reducing costs and staff, and this means improving individual and team productivity. It means ensuring projects are completed efficiently, on budget and on time. And, in a much more competitive world, it means improving customer service and selling skills, getting better at communicating and negotiating, and adapting technology to strengthen the organisation.

Priority Management – breaking productivity barriers.

Priority Management has been working for many years with leading banks, insurance companies, financial institutions, financial services companies, financial planning and wealth management organisations in Australia and New Zealand to assist them to:

- ⊕ Provide their employees with skills and tools to manage their time and their workload more productively, and to manage their emails and other information more effectively;
- ⊕ Use new technology devices such as Blackberries to give quantum productivity improvements;
- ⊕ Manage major and minor projects, including change management projects, on time, on budget, every time;
- ⊕ Coach their staff to improve individual and team performance, improve communications and influencing skills, and acquire negotiating skills that provide durable win-win outcomes;
- ⊕ Improve customer relationships and selling skills to assist in nurturing customers through the downturn and improving competitive positions.



What our Finance clients say about us...

Working Smart:

This is so empowering in our daily lives. It gives a sense of control over the most critical resource we have – Time!

Kerry Rosser - National Learning & Development Manager, ANZ Bank

ANZ will get increased productivity as a result of this course.

Ellan Tieu - ANZ Bank

The workshop was the top of the pile. It is rare to attend a course where every aspect is applicable. The guide book is brilliant.

David Thorley – Citistreet

I attended this course last Friday and it was EXCELLENT!! It was not just about calendar and email but also about identifying major factors that stop you from working 100% effectively and changing certain behaviours to ensure you get the most out of each day, maintain your work life balance and reduce stress. I would strongly recommend.

PA - Suncorp / GIO

I will be much more effective as a result of this workshop.

Dion Miller - Vic Super

The organization will have greater relationships and success in this area after the workshop.

Rebecca Watt - Vic Super

Very Interactive, Very informative, Very relevant.

Amber Walsh - Westpac Banking Corporation

Excellent course, any-one working in a corporate environment should do this.

Systems Support Officer - Suncorp

This course should be given to employees in the first 6 months - I have been in the bank for 12 ½ years, this would have saved me so much time and improved productivity.

Marie-Louise Solari - Business Continuity Manager, Commonwealth Bank

This [course] was excellent & very helpful. If you are looking to control your working day rather than the working day control you, Outlook tools will do it.

Kerry Love - Service Quality Manager, ANZ Bank

The content was extremely useful, relevant and targeted to the skill level of the group. I think this course is relevant to most roles at Macquarie, very relevant and useful.

Stacey Berkman – Associate, Macquarie Group

Comprehensive coverage of all of Outlook, very relevant and useful to my current role. The program has helped me greatly in organising my time and prioritising tasks. I am saving 30 – 60 mins per day but can see this increasing. Highly recommended!

Abby Nottingham - Senior Manager – Finance, Macquarie Group

Project Management:

Having no project management experience this course was simple enough to explain basics but complex enough that it showed practical skills.

Rebecca Halse - Citigroup

Practical way to put together a high level schedule and work through dependencies and critical path. Great method to work through with a team.

Danielle Rochecouste - Suncorp

Some Financial Institutions who have worked with Priority Management...

Macquarie Group Services
Citigroup
Vic Super
SwissRe
Citistreet
AMP
BT Financial Services

Rothschild
Greater Building Society
HSBC
Jardine Lloyd Thompson
ING
Newcastle Permanent
Companion Credit Union

Suncorp
Westpac Banking Corporation
National Australia Bank
ANZ Bank
Royal Bank of Scotland
Queensland Super
Wesfarmers Federation Insurance

Commonwealth Bank
St George
Merrill Lynch
IAG
Credit Union Australia
Sun Super
BankWest