Successful Sales Leadership I
for Branch Managers

This three-day course teaches the branch managers how to focus on the activities that drive sales performance.

Learn how to:
- Lead your team to meet the desired strategic outcome
- Focus on and manage the activities that will lead to goal attainment
- Develop the discipline to coach sales consistently daily, weekly, and monthly

Objectives:
- To develop the coaching and leadership skills necessary to drive sales performance in the branch

Topics:
Establish a Framework
- Communicating and establishing the company’s strategy and vision
- Translating the strategy into plans to execute
- Setting performance expectations
- Establishing sales and service practices

Coaching and managing improved performance levels
- Using one-on-one focused coaching
- Improving technical and product skills
- Motivating all employees and recognizing top performers
- Managing performance of the branch and all individuals
- Managing outside business calling initiatives
- Holding effective sales meetings
- Inspecting behaviors
- Measuring results
Successful Sales Leadership II
for Branch Managers

This two-day course will teach the branch managers how to “role model” relationship selling through profiling. They will personally perfect their sales skills, which will help them to succeed as a coach and to lead by example.

Learn how to:
– Develop a complete “profile” of a customer’s financial needs in order to understand short and long-term product needs
– Offer customers a complete package of services to meet their financial needs
– Call on business customers
– Cultivate existing business relationships and manage the client contact process
– Practice applying coaching skills to the selling process

Objectives:
• To develop true relationship selling through profiling

Topics:
• Building trust with customers
• Using a sales model
• Managing on-going customer contacts
• Cultivating business relationships
• Practice skills from the Sales Management Training Program:
  – Communication
  – Sales Focus, Expectations & Inspection
  – Sales Coaching
  – One-on-One Focused Coaching
Assistant Manager (or Teller Supervisor) Sales

This one-day course will teach assistant managers (or teller supervisors) how to coach and mentor their staff in a sales environment.

Learn how to:
- Focus on sales and service activities
- Manage personal goals and be accountable for the branch success
- Coach the team to use a service environment to maximize sales opportunities

Objectives:
- To develop a strong sales and service culture among teller positions

Topics:
- Coaching and developing sales in a service environment
- Using one-on-one focused coaching to direct activities and get results
- Developing individual and branch goals
- Using a sales referral model
- Recognizing & rewarding cross-selling excellence
Successful Sales for Platform Employees

This two-day course will teach branch sales employees how to meet their personal sales goals and exceed customers’ expectations.

Learn how to:
− Complete a thorough profile on new and existing customers
− Offer complete financial product package solutions
− Call on business customers
− Build a referral network
− Manage your personal performance daily, weekly, and monthly

Objectives:
■ To develop the skills necessary to excel in sales in the financial services arena

Topics:
■ Profiling customers to understand their complete financial needs
■ Building trust with customers
■ Using a sales model
■ Recommending a complete financial package of services
■ Managing the customer contact process
■ Cultivating business relationships
■ Using One-On-One Focused Coaching
■ Building a referral network
■ Engaging in competitive shopping to understand your institution’s strengths and weaknesses
■ Handling obstacles
■ Developing an action plan that will lead to success
Successful Teller Sales

This one-day course will teach all tellers how to help their customers meet their financial objectives.

Learn how to:
– Build customer trust by providing outstanding service
– Identify cross-sell opportunities
– Meet personal goals
– Turn service encounters into sales opportunities

Objectives:
To enhance customer relationships by making referrals to sales officers

Topics:
• Building trust with customers
• Developing listening skills
• Looking for cues and clues
• Using a sales referral model
• Working through objections
• Recognizing cross-sell opportunities
• Developing personal goals and accountability