
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