ANTHONY COLE
TRAINING GROUP, LLC

The Bank Specialty Group (BSG)

The Banking Industry's Source for Revenue Growth

ACTG has 25+ years of experience working with banks (and credit unions) helping them hire and develop sales teams and create stronger sale cultures. Based on our experiences, we have customized our training and development specific to banking needs. Training can be delivered with live instructor (always ideal for practice sessions) or via online modules and live broadcast meetings or an integration of these deliverables for optimum results. Call or email us today for more information: (513) 791-3458 or jeni@anthonycoletraining.com

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Sales Team Evaluation

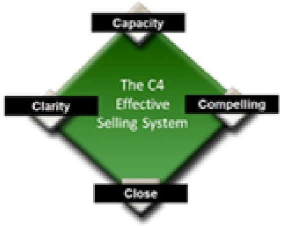
The decision to evaluate your sales team helps leaders answer these 4 critical questions for your bank:

- Can we be more effective?
- How much more effective can we be?
- What will it take to accomplish that?
- How long will it take to accomplish that?

In order to help a bank or credit union develop their salespeople and managers, we recommend and utilize the #1 sales evaluation in the world. It provides us with a customized roadmap for the organization to sell more, more quickly at higher margins.

Sales Managed Environment® for Sales & LOB Leaders

Managing salespeople is one of the toughest job in the universe and sales managers need the right tools, systems and processes to do it successfully. Most of the bank sales leaders we work with do not have a sales management background or the skills necessary to lead their team to top levels of production. We provide managers with a systematic process for coaching and motivating their existing staff and a proven process for hiring better salespeople. Our Sales Managed Environment® Certification has been tailored to the banking industry.



The Effective Selling System (ESS) for Relationship Managers

In order to sell financial services to your prospect or client, you must help them discover what they need by asking great questions, actively listening, providing the right recommendation and finally, helping them make the right decisions. There is a skill and a process that will help your RMs become much more effective at selling and at helping your prospects and clients reach their financial goals. The Effective Selling System (ESS) follows a 4-step approach including (1) uncovering a prospect's Compelling Reasons to make a change, (2) discovering their Capacity to make a change (time, budget & resources), (3) gaining Commitment to make a decision and (4) effectively Closing for a decision. Our experience tells us that most bankers have great technical/banking skills but are not as skilled in these areas of consultative selling.

How to Hire Bankers Who Will Sell

The banks we work with tell us that hiring bankers who are successful salespeople is difficult and a 7-digit problem for them. Do you need a better approach? This program will provide you with a proven process for searching, interviewing, hiring and on-boarding salespeople. You will gain hiring tools that you can use immediately to take the guesswork out of hiring bankers who can and will sell successfully at your bank.

Product Launches

While focused on serving the client holistically, banks do roll out new products periodically. We can work with your marketing and training team to train your sales team on an effective way to find the right 'zebra' – target client for that product, suggested approaches and scripts for calling them and how to ask the best qualifying and closing questions. This deliverable is customized and integrated with the new product or brand that the bank is launching.

Calling Efforts

A banker's best calls are to their current clients so it is important that they be skilled when they make those calls. Banks hire us to help make sure that their salespeople do a great job on the phone cultivating their relationships and uncovering additional financial needs. Asking the right questions does not always come easy for many bankers so we help them develop and practice this skill so that they have 'quality conversations'. We also coach entire teams for 'call nites' and efforts outside of daily calls. We can review or provide scripts (to be used as guides) that will help your salespeople have a high number of 'at bats' on the phone.

Increase Your Branch Traffic with COIs

Competing for business in today's banking world is a growing challenge with the prevalence of online and remote access to banking services. So, your branch personnel need to be very effective developing long term and highly profitable relationships with centers of influence. We will arm your branch salespeople with a proven approach as well as the tools to increase outbound calling and scheduling appointments in your branches to dramatically improve your sales results and client relationships.

On-boarding New Salespeople (Also great for Integration of Acquired Salespeople)

Some companies call this orientation or boot-camp. We call it Immersion and have mastered the process for helping our bank clients make their new business banking, retail, commercial, private banking, mortgage and investment salespeople more effective in the first 90 days. We work closely with management to understand the specific areas of focus, train your salespeople on an effective sales process (customized to your bank process) and provide tools and accountability tracking for managers to inspect. Effective Selling System Immersion is an essential soup to nuts program if you need your new people to be productive quickly.

Annual Client Reviews and Building Enduring Relationships

How effective are your salespeople at having annual relationship reviews with their investment and business clients? This is an essential process for building long term, enduring relationships and most of your salespeople are probably not skilled in this area. We take them through the start of the conversation, asking for the review meeting, how to optimally prep for the session including understanding partner products. Most importantly, we help them develop their skills of asking the right questions to find out what is keeping that business owner (or investor) awake at night. This annual opportunity, when done effectively, should lead to building advocates as well as additional revenue.

Personal & Business Work Plan

Planning should not be an annual event but it usually is. We have a long history of working with our bank and credit union clients to help their people create the roadmap to meet company and individual goals. Motivation is an internal process so we help our bankers (who are usually strong with the numbers) find the inspirational side of creating a work plan. Why do people want to do well and excel? What's in it for them? Linking the personal goals together with a business Success Formula of sales activities needed to achieve revenue goals provides your salespeople with a roadmap they can work with all year long.

Retail - Maximize the Initial Call

A new prospect walks in the door and enquires about a checking account or a home equity loan. Or they have a problem with a current account. How effective are your account openers at transitioning from the trigger event and asking the right questions to uncover the customer's broader spectrum of needs? We work with banks and credit unions, augmenting their front-end account opening system, to make their people more courageous and skilled at asking questions and building that advisory process and trusted relationship from the start. Who knows when you will see that customer again in your branch - this may be your one chance!

Link In or Lose Out

According to a recent research study done by the ABA*, 76% of the banks surveyed think social media is important to their bank but only 34% are very active. Are your relationship managers and advisors leveraging online tools to find and acquire sales leads as they could and should? In our own research, creating and converting leads is the number one problem for most banks and investment firms.

Focusing in on LinkedIn as a primary sales tool, we will show Relationship Managers and Sales Leaders a proven process for defining, searching and finding the right people to connect with on LinkedIn. Participants will leave with best practices to use right away on this powerful tool that reaches over 500 million users.

"During 2016-2017 we have experienced a 20% reduction in our sales force. Our fee income however, has increased by 50% in that same time". I can attribute that to our sales team being better in their selling process and ***that*** *is directly attributable to the Anthony Cole Training program."*

Head of Commercial Lending, Community Bank

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