

Transformative Branch Conversations

Sales & Sales Leadership Development for Retail Banking



CARE: Retail Training for Finding and Deepening Relationships

C

*Confident and
caring positioning
statement or
question*

A

*Assess needs by
asking quality
questions*

R

*Recommend next
steps or solutions
by summarizing
needs*

E

*Establish follow up
and expand
relationships to
include others*

Delivered by Anthony Cole Training Group

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★ Real Results

"Anthony Cole Training Group has become a partner. Introducing "sales" to a community bank retail team is a very daunting task. Cultural fit is probably the most important component to get the buy in to any message that is being delivered. Our trainer has been spot on with our team, he took the time to understand us and he is making an impact on a team of bankers ranging from 45 years in banking to 2 months. The material, the delivery, the support team are all first class. We expect to expand and deepen our engagement with Anthony Cole."

- EVP, Chief Banking Officer

"This program separates itself from other programs in that it builds off of a banker's common desire to help others. Each session ties back to bankers positioning themselves as helpers, guides and valuable resources for the communities they serve. This program is ideal for community banks of our size."

- Retail Banker

★ Transformative Branch Conversations

How is your bank addressing the changing customer trends, and decreasing reliance on the branch network for their solutions?

Consider the impact your branch people can have. Top performing banks are arming their people with a transformative approach to initiating distinctive relationships with their clients and prospects, building trust through meaningful conversations. This retail training curriculum will provide an approach to develop your people, who are the essential differentiators for your bank from the many digital options.

- Break-through approach to gain the engagement for deepening relationships of clients and prospects
- 4-step relationship building process to consistently follow across branch network
- Coaching methodology to help branch managers develop talent

★ Ideal Participants include:

- Head of retail
- Area retail leaders
- Branch managers, Assistant branch managers
- All branch personnel in new accounts role
- Training partners

★ Learning Outcomes

At the conclusion of this program, participants will:

- ✓ Understand what is holding them back from having better conversations
- ✓ Make outbound calls more confidently and consistently
- ✓ Uncover the reasons a prospect will take action
- ✓ Be able to deal with stalls and objections more comfortably, it's just another question
- ✓ Have an approach to increase engagement with prospects & clients
- ✓ Recognize what it takes to build relationships quickly
- ✓ Ask more robust questions, guiding the client to make strong financial decisions
- ✓ Feel more comfortable expanding relationships and introducing partners
- ✓ Build more client advocates who will introduce them to others
- ✓ Ask better, helpful, guiding questions for deeper understanding
- ✓ Listen more intently to understand

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Course Curriculum

Training Modalities include Onsite, Live Broadcasts, and Online Learning

Courses for Bank Leaders

Why a Sales Managed Environment®?

Setting Standards & Accountability

Introduction to an Effective Selling System

Coaching for Success

Motivation that Works

Coaching Sales DNA

Coaching an Effective Selling System

Courses for Bankers

DNA of a Successful Relationship Manager

Engaging Conversations in the Branch

Will to Sell & Need for Approval

Exceed Expectations/Create Advocates

Outbound Calling/Build Relationships Quickly

Art & Science of Asking Questions

Robust Conversations

Uncovering Compelling Reasons

Developing Centers of Influence

Hearing the Cue Cards

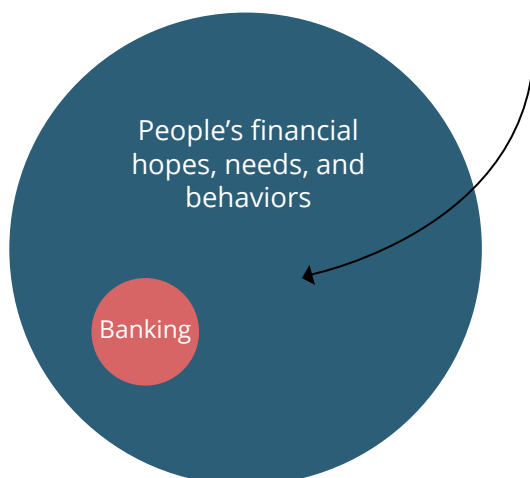
Selling in Challenging Rate Environment

Expanding Relationships & Stewardship

Getting Introductions

Maximize the Initial Call

The opportunity for banks is here.



Source: Nonfiction Research / FICO Bank Customer Study 2020

Helping Community Banks Grow.



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