ANTHONY COLE
TRAINING GROUP, LLC

Transformative Branch Conversations

Sales & Sales Leadership Development for Retail Banking

30 YEARS
EST. 1993

CARE: Retail Training for Finding and Deepening Relationships

C	**A**	**R**	**E**
Confident and caring positioning statement or question	*Assess needs by asking quality questions*	*Recommend next steps or solutions by summarizing needs*	*Establish follow up and expand relationships to include others*

Delivered by Anthony Cole Training Group

8160 Corporate Park Drive, Suite 100
Cincinnati, OH 45242

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

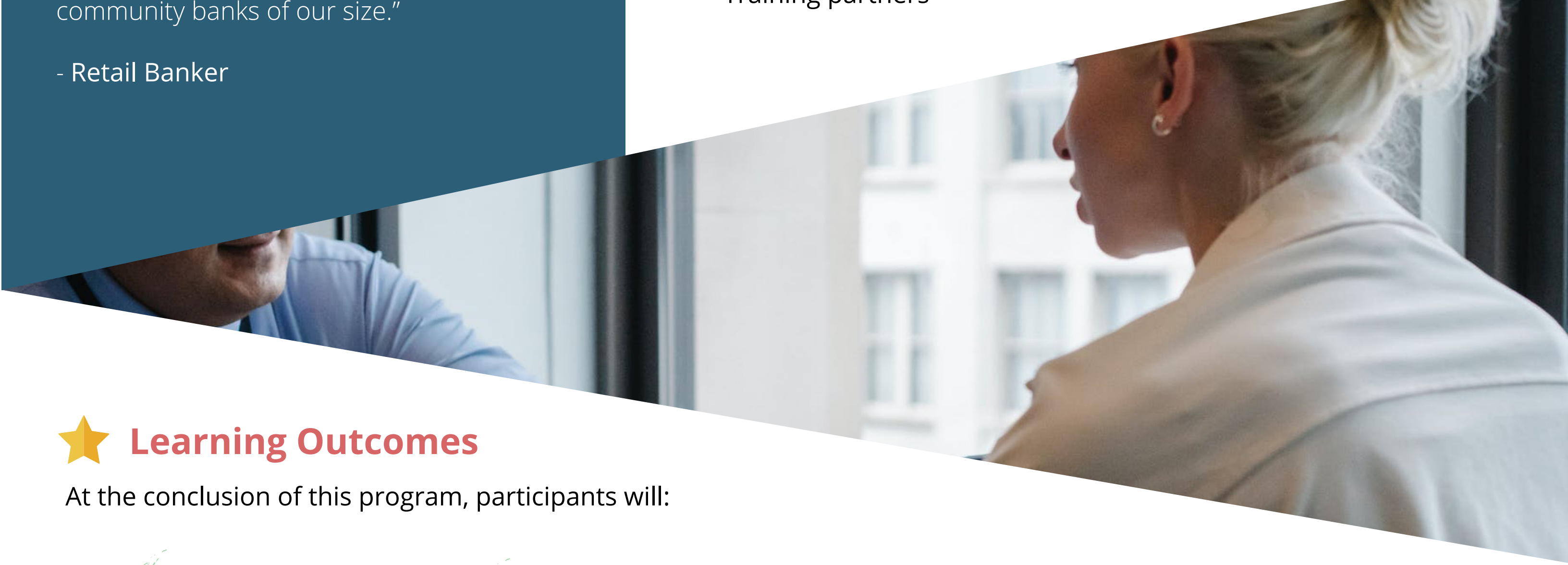
How is your bank addressing the changing customer trends, and decreasing reliance on the branch network for their solutions?

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

Transformative Branch Conversations

Training Objectives & Curriculum

Account Opening & Building Relationships Quickly

The Big Idea: Building trust and rapport are the foundation of any relationship, particularly when accounts are being opened. We teach how trust is built and the "how to" of building relationships quickly.

Courageous Branch Conversations

The Big Idea: The best conversations with a customer are those when the banker asks tough questions...even if it is uncomfortable for them. We teach them why and how to ask anyway because it is in the best interest of the customer.

First Impressions & the Customer Experience

The Big Idea: Bankers get one chance to create a positive first impression and they have only a few seconds to accomplish that. We teach them what to say with care and confidence helping to set the bar high for a great start to the customer experience.

Building Confidence

The Big Idea: Consumers and businesses expect their financial advisors/relationship managers to be confident in making recommendations. We teach that confidence comes from preparation, experience and mindset.

Developing Centers Of Influence for Branch Managers

The Big Idea: Centers of influence should be a significant source of new customer relationships. We teach a systematic way of creating and cultivating those relationships to create channels of new opportunities.

Life Experience & Advice

The Big Idea: Bankers must be prepared to offer guidance for customers of all ages and life experiences such as buying a home, starting a family, or thinking of retirement. We team them how to ask appropriate questions about their customer's stage in life, even if they have not experienced that themselves.

Problem Resolution

The Big Idea: It is a fact that no financial institution is perfect...people and organizations make mistakes. We teach the bankers a way of defusing and addressing problem situations and creating additional brand equity because of how the problem is corrected.

Engaging Branch Conversations

The Big Idea: Two-way, engaging conversations are the best kind of conversations. We teach the question-asking skills that allow it to happen...where bankers are speaking the customer's love language because they are guiding the customer through the challenges of their financial life.

Transformative Branch Conversations
Training Objectives & Curriculum

Expanding the Relationship & Stewardship (Asking About Accounts at Other Banks)

The Big Idea: Financial institutions are often focused on cross-selling to drive market share, increase profitability and make the customer relationship stickier. What if bankers had the view that expanding the relationship is actually in the best interest of the customer and the right thing to do? We teach a natural and comfortable way to initiate the conversation about other accounts the customer may have at other financial institutions.

Outbound Calling

The Big Idea: Outbound calls are not made because the bank's retail bankers are afraid (possibly terrified) to make them. We teach an 8-step phone approach that bankers will use, because it is a conversation and not salesy**.**

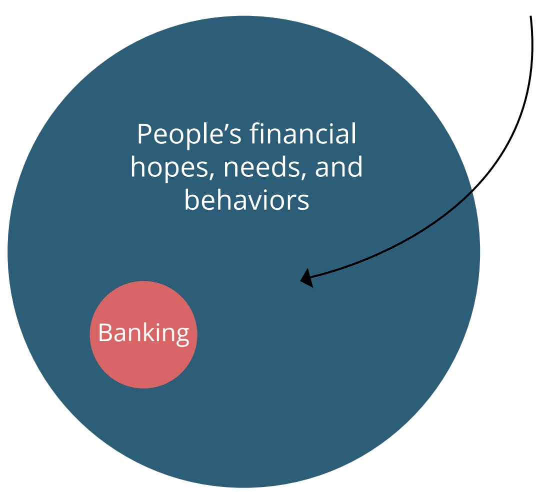
Robust Client Conversations – Becoming a Trusted Advisor

The Big Idea: The book "Fierce Conversations" written by Susan Scott describes the best kinds of conversations as robust, passionate, and unbridled. We teach and have bankers practice asking the types of questions (open ended, thought provoking) that create those kinds of conversations.

Basic Listening Skills

The Big Idea: Most bankers are not very good at listening…because most bankers are more focused on the desire to be understood than the desire to understand. We will provide the team with practical ways to demonstrate active listening skills…and to listen for what is not being said as well as what is actually being said.

The opportunity for banks is here.



Source: Nonfiction Research / FICO Bank Customer Study 2020

Helping Community Banks Grow.

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