

*Leading Your Banking Team to **Sales Success***



*Sales Leadership Development for Retail, Business
Banking, Commercial, and Wealth Leaders*

*Delivered by Jack Kasel, Sales Development
Expert & Community Bank Specialist with
Anthony Cole Training Group*



*Performance
Management*



*Motivation
that Works*



*Coaching
for Success*



*Hiring and
Upgrading*

"I've never had fun role-playing until now. It taught me a lot about how I could apply the teaching. You had a way of making the role-play relevant, useful, and not too terribly awkward. Your personality and way of delivering the information were very engaging. I liked that you are also still selling so you had real-time examples rather than being a trainer that either has never sold or hasn't sold in several years."

- Ariana Meiser, Business Banking Sales Manager, Merchants Bank of Indiana



Real Results

"The content of this training was spot-on. I do feel I am better prepared to coach my team to help them improve their performance. What made this training extraordinary was the instructor's skilled presentation skills and delivery. In our 30 years of being involved in different training, this was by far the highest quality and most relevant. Our instructor provided real life examples that were extremely valuable."

"The best training I have attended in my 10+ years of banking leadership."

"This course Exceeded my expectations. Accountability – overcoming excuses when they are valid reasons. Building and maintaining a recruiting pipeline, great session on developing USA, would like to continue to grow mine, would like this segment for my team."

"I've done a lot of "sales training". This is the most honest, informative and practical I have ever participated in."

Leading Your Banking Team to Sales Success



Proven Success Sales Leader Training Program

This program, *Leading Your Banking Team to Sales Success*, has been utilized for 25+ years by community banks across the country to help those in charge of sales teams drive increased relationships and revenue. Participants will gain a sales management framework including performance management, coaching, motivating and recruiting that will make an immediate impact on their sales team performance and results. If you are a sales leader in search of resources to take you to your next level of excellence, this program is for you.



Ideal Participants include:

- Community Bank CEO
- Head of Commercial and Business Banking
- Retail Leaders and Area Leaders
- Head of Wealth and Investments
- Rising Stars and Emerging Leaders



Learning Outcomes

At the conclusion of this program, attendees will:

• have developed a **Sales Success Formula** for their collective sales team

• be able to help RMs develop their personal Sales Success Formula and **coach them to it**

• **drive greater accountability** with their sales team by helping them eliminate excuses

• know how to **motivate their salespeople** with a 1 on 1 Extraordinary Goal Setting discussion

• utilize weekly meetings and huddles to **communicate and address** burning platform issues

• better understand and coach the **Will to Sell and Sales DNA factors** of their salespeople

• learn and utilize a **systematic approach to coaching** – the 5 Keys to Coaching

• understand how to execute effective pre, post-call, and observational calls with salespeople

• learn a stage-based **milestone centric sales process** to utilize with RMs/Lenders

• fully understand the profile of a successful RM/Lender at their bank

• improve interviewing skills specific to identifying sales winners and decoys

• learn a consistent process for building a candidate pipeline and **hiring successful bankers**

• obtain valuable onboarding questions and processes to **ensure new banker success**



Leading Your Banking Team to Sales Success

Program Curriculum

Program Overview

This workshop is guaranteed to be an intensive, high-impact program that will help Banking Sales Managers develop the critical skills to recruit, manage, coach, and motivate their team to extraordinary levels of performance.

Agenda Tuesday, October 29, 2024 (9 am - 4 pm):

Setting Standards & Accountability

- Success metrics – what to measure
- A process for setting Extraordinary goals
- Your role – the Shadow of the Leader
- Learn how to manage excuse-making and build ownership
- Identify the commitment levels of each team member

Coaching for Success

- The difference between leading, managing, and coaching
- Understanding The Will to Sell and Sales DNA
- What activities need coaching, how and when to coach
- 5 Keys to Coaching Process
- Coaching the Pre and Post Call

Agenda Wednesday, October 30, 2024 (9 am - 4 pm):

Motivation that Works

- Characteristics of The Motivator
- Understanding how your people are motivated
- Effective goal setting & action steps for personal goal setting
- Business goal setting and individual Success Formulas
- Effective huddles and sales meeting

Upgrading & Recruiting

- Cost of under performers
- The hiring process – 6 steps
- Candidate profile and recruiting formula
- Assessing – if you knew would you hire?
- The 5-minute interview & behavioral-based interview questions
- Onboarding process, checklist and questions to answer



Helping Community Banks Grow.



Instructor

Jack Kasel

Sales Development Expert & Community Bank Specialist



Jack has 30+ years of experience in sales and sales management spanning a host of industries including software, transportation, printing services, insurance and training. Since joining Anthony Cole Training in 2014, Jack has become one of our community bank specialists, helping our bank clients sell better, coach better and hire better. Jack works with Community Banks all over the country. He is a Community Bank expert.

Jack brings deep experience of feet on the street, practical selling as well as a coaching and training background, to help banks improve their sales results and close their sales opportunity gap.

Leading Your Banking
Team to Sales Success



October 29th & 30th, 2024

A Proven Success Program
for Community Bank
Leaders

Registration Form

Registration Pricing:

IBA Members

\$599/per person

\$499/per person for additional registrations from same bank

Fees include the program, materials, continental breakfast, lunch & refreshments.

Participation in IBA programs is limited to members, associate members, and nonmembers from an eligible membership category at applicable member or nonmember rates.

Confirmation / Cancellation Policy

The IBA will send confirmations as requested for its programs. Please check the appropriate box & include a fax number on the registration form. If you have questions, contact Laurie Rees via e-mail at Lrees@indiana.bank or by phone at 317 -387 -9380.

Within three or more business days prior to the day of an educational program, no cancellation charge will be assessed. Within two days prior, 50% of the fee is assessed. Refunds are not provided for cancellations 1 day prior or absences on the day of the program. Substitutions are welcome at anytime.

Bank _____

Address _____

City/State/Zip _____ State _____ Zip _____

Phone _____ Cell # (In case of bad weather, etc.) _____

Attendees

Name _____

Email _____

Name _____

Email _____

Name _____

Email _____

Total Amount Enclosed: \$ _____

Please Invoice Bank

Check Payable to IBA Foundation

Indiana Bankers Association

8425 Woodfield Crossing Blvd Suite 155E

Indianapolis, IN 46240

Credit Card Information: MasterCard VISA AMEX

Card Holder Name _____

Credit Card Number _____

Exp. Date _____ CVV: _____

IBA Foundation
8425 Woodfield Crossing Blvd
Suite 155E • Indianapolis, IN 46240
Register online: indiana.bank

Questions:
Laurie Rees, VP of Education & Training
317-387-9380 (Office) 317-727-5750 (Cell)
Email: Lrees@indiana.bank

This application form must be completed in full with signatures of applicant and recommending officer.
Application must be received by October 1, 2024.



Location

Indiana Bankers Association
8425 Woodfield Crossing Blvd.,
Suite 155E
Indianapolis, IN 46240



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*A Proven Success
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Join us at this workshop in Indianapolis!



ANTHONY COLE
TRAINING GROUP, LLC