OUTSIDE CALLING SCHOOL

PRESENTED BY FOCUSEDRESULTS.BIZ

TOPICS:

1 OUTSIDE CALLING

2 NEGOTIATION SKILLS AND SELLING AT HIGHER MARGINS

3 RESEARCHING AND PROFILING YOUR CLIENTS AND PROSPECTS

PROGRAM OVERVIEW

The 2-lesson Outside Calling School will deliver the most up-to-date selling techniques to help you and your company deliver loan and deposit results.

You will go through the selling process to identify how to gain the trust of your client, gain a larger share of wallet, and sell what your client truly needs.

We will also address how to effectively manage the pricing discussion, how to overcome objections, and how research and profiling the client/ prospect will improve targeting, prospecting and presentations.

MEET YOUR PRESENTER

Jennie Mitchell is Owner and CEO of Focused Results, a sales and marketing strategy, consulting, and training firm concentrating on results-driven process consulting and training experience in community banks and other financial institutions.

Prior to joining Focused Results, she was Director of Sales and Marketing for a $3 billion bank holding company, Sales Manager for a high-performing mid-level Indianapolis bank, and Director of Corporate Training for a large Midwest insurance company.

PROGRAM AGENDA

STEP 1: PRE-CALL PLANNING

- Calling successes and challenges
- Getting out of the office both virtually and in person
- Call planning on top clients & prospects
- Gaining the virtual or in person appointment
- The initial meeting
- More, Better, Different, Less Clinic
- Do we use technology or meet in person?
- Plan what to bring on the call
- Plan bridging and introductory comments

STEP 2: VIRTUAL OR IN-PERSON ENCOUNTER

- Get them talking!
- Listening and communicating how you can help
- Making a recommendation and asking for the business
- Earning referrals
- Premium pricing
- Negotiating techniques
- War Games – Handling objections

STEP 3: POST-CALL FOLLOW UP

- Expanding your notes to capture the call
- Calendaring follow up activities
- Drafting a thank you note
- Assessing the call
- Compete on anything other than price
- The value proposition?
- Draft an Action Plan for skills transfer