

# Outside Calling School – Live E-Classroom

## HALF-DAY VIRTUAL TRAINING - July 13 and July 20, 2023

The two-part Outside Calling School helps you drive new revenue, understand your clients, and maximize your time spent selling. You will learn how to tailor your value statement to match the needs of the individual or business borrower or buyer. We emphasize how to spend your time on the right clients that result in sales growth, while maximizing the highest value opportunities in your market. We utilize a password protected and encrypted Zoom platform that enables us to deliver the presentation in a classroom format, plus offer the opportunity to participate in group exercises and discussions in separate Zoom rooms.

### SPEAKER PROFILE

Jennie Sobecki is co-owner and CEO of Focused Results, LLC, a sales and marketing strategy, consulting, and training firm, concentrating in results-driven process consulting and training experience in community banks and financial institutions.



**INDIANA  
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### SCHEDULE

Log In: 8:30 a.m.

Program: 9:00 a.m. to 12:00 p.m.

Times are in EST.

### Thursday, July 13 - Prospecting and Call Preparation

How do I get more prospects in the funnel and improve my sales results? This lively presentation will give you proven tips, techniques and systems from the most successful sales oriented financial institutions, to enhance your skills and improve your productivity. You will learn the most efficient ways to prospect, including how to set appointments through virtual technology, email, phone calls and direct mail. You will also learn to properly set up an in-person or virtual sales call to deliver results.

#### Program Agenda

- Designing your value proposition to define why someone should meet you
- How much prospecting anyway?
- Generate more leads through your best clients
- Getting appointments
- The Ping Strategy - a method of staying in touch
- When do I abandon a prospect?
- Free prospecting tools
- Free databases and meeting technologies
- How will I measure success?
- Pre-call research
- Effective technology approaches

### Thursday, July 20 - Buyer Behavior and the Winning Call Experience

This fast-paced e-classroom seminar will look at the differences in opinions, views, and buying behaviors of individuals and businesses. You will learn how to modify your strategies to grow business from each generational segment, including appropriate adjustments to your digital and in-person client approaches and experiences. Your buyers are regular consumers, business owners, employees, corporate executives and so forth, but how they are affected by their age cohort has an effect on how they make financial decisions. You will also hear and discuss how to effectively deliver a winning experience inside a personal or virtual call, including opening comments, effectively asking great questions and follow-up. We pay special attention to professionally closing, as 64% of salespeople fail to ask for the business.

#### Program Agenda

- Generational similarities in decision-making
- Which sales approaches appeal to each generation or buying group
- Making the Sales Call
- The Critical Importance of Sales Questions
- Moving the Sale Forward
- Managing Key Objections
- Effective Digital Closing Technique
- Sales follow-up
- Tactical roadmap to beat the competition

# Outside Calling School - Virtual

(Dept. 60)

*Please type or print legibly.*

*Copy this form for additional participants.*

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Name

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Nickname for Badge

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## **Registration Fees**

### **IBA Member**

☐ \$350 both sessions

Participation in IBA programs is limited to members, associate members and non-members from an eligible membership category at applicable member or non-member rates. 100% surcharge for non-members will be applied.

### **Payment Information**

Total payable to the IBA Foundation, Inc.

☐ Check Enclosed ☐ VISA ☐ MasterCard

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Account Number

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Exp. Date

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Billing Zip Code

## **CONFIRMATION/CANCELLATION POLICY**

The IBA will send confirmations as requested for its programs. If you have questions, contact Beth Abney via email at [babney@indiana.bank](mailto:babney@indiana.bank) or 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 the day before or absences on the day of the program. Substitutions are welcome at any time.

## **SPECIAL ACCOMMODATIONS**

The IBA is committed to providing the best education in the best facility possible. To that end, we strive to accommodate any special needs bankers may have while attending our programs. If you need special accommodations, please let us know.

## **PLEASE RETURN THIS FORM :**

**IBA Foundation Inc.**

8425 Woodfield Crossing Blvd. Suite 155E

Indianapolis, IN 46240

317-387-9380

Register online: [Indiana.bank](http://Indiana.bank)

## **DATE & LOCATION**

This seminar will be held virtually as two half-day trainings on July 13 and July 20, 2023.

## **ATTENDEE PROFILE**

Frontline salespeople such as branch managers, wealth managers, commercial lenders, mortgage and consumer lenders, and business development officers will find the strategies, techniques and tools discussed will have a tremendous impact on sales growth.



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