

*SALES  
LEADERSHIP  
EXCELLENCE*



*A Proven Success Program for  
Community Bank Leaders*

*Delivered by Jack Kasel, Sales Development  
Expert with Anthony Cole Training Group*



*Performance  
Management*



*Motivation  
that Works*



*Coaching  
for Success*



*Hiring and  
Upgrading*

*"The Anthony Cole Training Group's sales management process is vital to the overall success and for the accountability and motivation of our 'feet on the street'. I can't think of any sales organization that can afford not to invest in the kind of sales development that ACTG provides."*

**- SVP Regional Bank**



## 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."*



## Proven Success Sales Leader Training Program

The Sales Leader Excellence program 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:

- understand the **critical sales management functions** and how much time should be allocated
- **drive greater accountability** with their sales team by helping them eliminate excuses
- better understand and coach the **Will to Sell and Sales DNA factors** of their salespeople
- fully understand the profile of a successful RM/Lender at their bank
- learn what sales activities, behaviors and crucial metrics must be tracked
- know how to **motivate their salespeople** with a 1 on 1 Extraordinary Goal Setting discussion
- learn and utilize a **systematic approach to coaching** – the 5 Keys to Coaching
- improve interviewing skills specific to identifying sales winners and decoys
- have developed a **Sales Success Formula** for their collective sales team
- learn how to help RMs/Lenders create their Ideal Week, so they can self-manage their time
- understand how to execute effective pre, post-call, and observational calls with salespeople
- learn a consistent process for building a candidate pipeline and **hiring successful bankers**
- be able to help RMs develop their personal Sales Success Formula and **coach them to it**
- utilize weekly meetings and huddles to **communicate and address** burning platform issues
- learn a stage-based **milestone centric sales process** to utilize with RMs/Lenders
- obtain valuable onboarding questions and processes to **ensure new banker success**





# SALES LEADERSHIP EXCELLENCE

## 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, April 16, 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, April 17, 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 underperformers
- 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 400m-5b 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.



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**April 16<sup>th</sup>-17<sup>th</sup>, 2024**

# Registration Form

DEPT.# 53

**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 \_\_\_\_\_

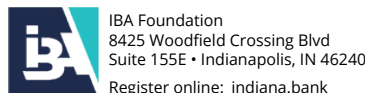
Credit Card Number \_\_\_\_\_

Exp. Date \_\_\_\_\_ CVV: \_\_\_\_\_



**Location**

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



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

Please return the completed application by March 25th.