Great Cross Selling

Tennessee Bankers University Web Seminar

On Demand now

Description

The question is not if customers need our products and services, but rather which ones best meet their needs. Through contact and conversation bankers learn a lot about their customers needs, wants and life circumstance. This program teaches bankers to take what they learn from a customer and use it build stronger relationships.

Features

Cross-selling is helping the customer solve problems with additional bank products and services. Great cross-selling is helping the customer identify those problems, using your products and services to help the customer, and not product pushing.

We work with the customer by asking great questions, listening, and then recommending. In on-boarding the customer, viewers will learn how to effectively follow-up with the customer within the first 90 days to give the customer the opportunity to add additional products and services without the customer having to come to the bank.

Agenda:

- Why cross-sell?
- NO PRODUCT PUSHING!!
- Asking today and future questions
- Becoming a "dream maker"
- Helping the customer save money, make money, save time, and provide customer convenience
- Contact criteria for on-boarding
- Building the 2+2+2 follow-up plan

Workshop Resources

This program provides materials and information to assist in developing an action plan cross-selling and on-boarding the customer. Program participants receive a manual, accompanied by a 30 minute video webcast.

Expected Audience

This presentation is designed for the customer service representative, platform banker, branch manager, and everyone else involved in the account opening process in a retail bank environment.

Speaker

Jennie Sobecki is a principal of Focused Results, LLC. Ms. Sobecki has over 20 years of results-driven process consulting, sales management, and training experience in financial services. An expert in designing and implementing sales efforts and processes, Ms. Sobecki designs solutions to drive top line growth through better utilization of existing sales forces in banks, insurers, and other financial institutions.

Ms. Sobecki is a graduate of Indiana University and has a certificate in consulting services from Ball State University. An entertaining and charismatic speaker and consultant, Ms. Sobecki consults with numerous financial service organizations to enhance revenue, sales, sales leadership, and organizational performance. Her processes routinely generate three-fold increases in vital sales activity, and double-digit increases in deposit and loan volume.

What is an On-Demand Course?

It is a training tool that gives you and your staff **on-demand six months unlimited access** to a variety of topics presented by names you trust—**for one low price**. Each course includes a video presentation from the speaker, audio and slides—plus a detailed manual for download and a Question and Answer Forum for answers anytime.

The process is simple. Enroll in a course, pay online with a credit card, and receive an e-mail immediately with your link to your course. The same login information and link is used to access all courses you purchase using your account. Your computer will need speakers to receive the audio presentation. There are no special hardware or software requirements to view the program. Presentations lasting in excess of one hour are broken down into 30 minute segments to make it easier to manage class participation time.

Special note to Trainers: This system gives you the ability to develop your online training library. Using one link, user name and password anyone in your organization is able to access the program for six months. The manual and other supporting materials are available to anyone with the login information. You forward the login information, assign the courses to watch and let the learning begin.

Registration

http://www.speakersmic.com/tnba

Secure online registration allows you to enter your registration directly into our system, and receive your invoice immediately. You can pay with a Credit Card or generate an invoice to be faxed or mailed with a credit card # or check. Registrations will be processed when payment is received.

Fill out this form and Fax it to: 888.420.4806
Mail check payable to: Speakersmic.com LLC, with form to:
974 Breckenridge Ln., #253 Louisville, KY 40207
[_] Great Cross Selling—$159
Running Time: 30 Minutes
This course includes a manual and a video presentation

Full Name | Title

Bank

Street Address

City | State | Zip

Phone

E-mail ***required for registration and confirmation**

Payment Method: [_] Visa [_] Mastercard [_] AMEX [_] Check

Card Number Expiration / / Security Code

A 3 or 4 digit code on the back for VISA /MC front for AMEX

For Questions or to register by phone: call Speakersmic @ 888.325.0974

This program is submitted for .5 hours of credit from the Institute of Certified Bankers (ICB); exact hours and area of application to be determined. Please make application directly with ICB.