

Gut Check Time for Sales Coaches

Perhaps you are new to the role of sales coach. Maybe you have been a sales coach for many years. Whatever your tenure, I'm going to assume that your boss isn't a sales coach and therefore you may not have the advantage of someone who is invested in helping you to continue to fine-tune your own coaching skills. Your supervisor's interest is more likely focused on you "just making it happen."

Unlike a sports coach, you may not have the opportunity to attend "coaching clinics." It is likely that you wear many hats in your organization and you've already figured out that coaching takes time—time that you may frequently feel you don't have. So, let's take this opportunity to provide you with a "gut check."

Ya Gotta Wanna

First, it really can't be a question of time. It's about dedication. *How dedicated are you to making sure that your sales staff is the best that it can be? How devoted are you to ensuring that your sales staff is at the top of their game? How dedicated*

are you to achieving the success of your department making its numbers?

Focus on Sales Process and Sales Disciplines

Less skilled and perhaps less experienced sales coaches often fall into the trap of making it all about the results. They spend the majority of their coaching discussions centered around the previous results. Just as the coach of a sports team doesn't spend a significant amount of time dwelling on the score of the last game, neither should you spend much time discussing the monthly or quarterly results in your coaching session or your sales meetings. It's history. Do a quick review. Ask your sales person how they feel about the results- what they did well, where they are still struggling, and what they plan to do differently.

You'll get much better results helping your sales people fine-tune specific sales skills and ensuring that they are engaged in generating lots of quality activities that can lead to sales (e.g. retention calls,

annual business meetings, asking for referrals, educating those outside your area of the bank about their ideal prospect, communicating their interest in meeting those who fit that profile, and working their centers-of-influence).

cont.

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Loyd Pohl, CEO, Pohl Consulting and Training, Inc.

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Focus on What's Next

The best use of your coaching time is to help the sales person focus on what he/she is going to do next. Who will he/she call on? What's the goal for the call? What high-value questions will he/she employ to learn more and more about the client or prospect? Now, if you are thinking *but I only meet with my sales people once a month or once a quarter*, we'd recommend that you rethink this practice. One of the most important things that a sales coach brings to the table is the ability to create a sense of urgency and energy about the sales effort. Coaching on an infrequent basis sends a clear message---sales/new business development is just not that important around here. Not all coaching sessions need to be long. One minute coaching can work wonders.

See Your Sales People In Action

Please don't misunderstand. The numbers are important as they indicate what's happening- or in some cases not happening- but the numbers are only part of the story. You can't be a credible coach without seeing your players in action. The numbers of completed calls are just that---numbers on completed calls. You can't assess the quality of the call without seeing the caller in action. Go on calls with your sales staff. Watch your sales people in action. Notice we said watch. Don't take over the call. Clarify with your sales person that he/she is to take the lead. A joint call where you take-over for the sales person doesn't help you to identify your sales person's strengths and/or skill deficiencies.

Establish a Supportive Climate & Listen

Your role is to help a salesperson crystallize his/her understanding of their own performance, set goals and make plans to achieve those goals. By establishing a supportive climate, you encourage the sales

person and create a climate that is conducive to self-analysis and greater understanding of what he/she needs.

Listening to the sales person is key to learning how he/she feels about his/her skills and overall performance. Ask questions that help him/her analyze his/her performance. As the sales coach, you help clarify alternatives and can increase the sales representative's motivation to achieve goals and to implement plans.

Ken Blanchard, *The One Minute Manager*, says it best, "If God had wanted us to talk more than listen, He would have given us two mouths rather than two ears." In your coaching sessions, use open-ended questions designed to encourage the sales person in self-analysis of his/her performance. Then listen!

Set Mutually Agreed-Upon Meaningful Goals

Goals are best achieved when they are concrete. Engaging your sales staff in discussions to identify what their individual contributions should be to the overall department goal is most beneficial. Everyone needs "skin in the game." The best sales coaches take this a step further---in cooperation with their sales staff they create weekly call goals. Weekly call goals help ensure that your sales staff is generating the kind of proactive activity that will result in sales. Weekly call goals also allow you to respond more quickly if the sales person is off-track.

Don't Neglect Your Top Performers

Often we spend a significant amount of time getting our marginal performers on track to perform at a higher level. It seems to be human nature to focus lots of energy on those who need to improve the most.

The danger is that we neglect our top performers. After all, what can we really do to help them? Failing to engage with your top performers in your role as their coach is a serious mistake. Everyone needs coaching. Certainly our top performers need and deserve to be recognized for their accomplishments. Take the time to ensure that your top performers know that you appreciate their contributions. As in all areas of life, little things left unattended can become big things. Make time to meet with your top performers. Ensure that you have an open line of communication and that he/she knows you care. In addition, you may learn a great deal about what's working that you can pass on to those who may be struggling.

As we're in the final quarter of 2011, make a list of things you should be doing as a coach that could really make a difference in the performance of your sales staff. Take action NOW!

Retention Call Planning—the Math

In recent articles we've touted the value of retention calling. We are frequently asked, "How often should I call on customers?" Our answer is "Yes." What we mean by that is by all means engage in making proactive retention calls, but the "how often" is really unique to each operation.

The following formula will help you to establish realistic retention call goals and perhaps help you identify where some account load balancing would enable you to provide higher levels of service and revenue.

There is little question that your customers who receive proactive contact will be more satisfied. Our client surveys consistently show that customers who are satisfied with the level of contact from their wealth advisors/trust officers are satisfied with the relationship—

including investment performance. Equally important, they report a strong willingness to refer others.

How to Determine the Number of Calls

The first step is to calculate the current revenue stream generated by the customer. Determine how many dollars each customer pays to your organization annually. Add to that any potential additional earnings that could be available if you landed the rest of the customer's business that you are aware of. For example, if you have a 401(k) plan with annual fees in excess of \$10,000 but are aware that the company also has (elsewhere) a traditional money purchase profit sharing plan which would generate additional fees of \$7,000, you should assume this is a \$17,000 annual revenue client.

By doing this calculation for each of your clients, you can then determine the average value in fee dollars of all customers. This is achieved by taking your total fee revenue and potential from existing customers and dividing it by the total number of customers that your organization serves.

The second step is to aggressively (but realistically) determine how many calls per month each of your calling employees (officers or not) can make. By totaling this number for all employees and multiplying by 12, you now have a total number of retention calls that you are able to make for the year. (S T R E T C H or you won't be maximizing your effectiveness.)

Next, divide your total fee revenue by the number of retention calls available. This will give you an average number of retention calls per customer. This is the number of calls that you should make on an "average" customer, which was defined by your calculations above. *cont.*

Guest Article

Finding That Hot Button

by

Dan Savage

**Senior Vice President & Senior Trust Officer
Cross Plains Bank, Madison Wisconsin**

Let's use an example: Suppose that your average customer value (including unsold additional fee potential) is \$5,000 and that the total number of customers is 800. This tells us that your potential revenue is \$4 million. Your staff can make a projected 2400 calls during the year.

It gets a little tricky, but stick with us – the logic will bear it out. By dividing the 2400 allocated retention calls by 800, we get an average of three calls per customer. Since we have already determined that the “average” customer has a total current fee and potential fee value of \$5,000, we now know that such average accounts should be called on three times per year. By using this as a base, one can develop a standard for accounts of any size.

Accounts between \$3,000 and \$5,000 total fee income and potential might receive only two calls a year. Those under \$3,000 might receive only an annual face-to-face visit. Accounts where current fees plus potential revenue are in the \$10,000 range might receive six calls per year.

Whatever formula you use, you can use the 2400 total allocated calls as a back check to **be certain that you are not committing to a number of calls greater than your capabilities**. However, we believe our example (three calls on a \$5,000 current and potential account) is minimal. **If you're not able to generate at least that many calls on such a client, rest assured that your competitors will.**

Whatever your strategy and long-term objectives (for example, consciously not wanting clients with less than \$3,000 in current and potential fees), a planned and organized retention calling strategy is critical to your long-term prosperity.

Anyone who has participated in sales training has heard this comment: *If you want to make the sale, push the prospect's hot button*. That's sound advice, but pushing the proverbial hot button only works when we can find it.

So...where is it located? How do we recognize it? The good news is that it's usually right in front of us... within listening distance. Here are several conversation tactics for learning what motivates a prospect...personally and with regard to business:

- *Inquire about your prospect's status and situation.* Where did he vacation? Where do his children attend college? How is his or her business faring at the moment? What is the history of the business and her involvement with it?
- *Ask questions about issues of pride.* What is his greatest business success... greatest personal success? What is her most important goal?
- *Dig deeper about goals.* What is his primary objective for the company this year? How will it be accomplished? What are possible barriers to success? Where will the business be in five years?
- *Inquire about personal interests.* How does she spend free time? What sports or hobbies is your prospect interested in?
- *Ask about what he would do if he didn't have to work.* What are his other dreams and ambitions?
- *Last but not least, pay attention to everything in your*

prospect's office. Notice what is prominent, separate, or appears to be special. If there are pictures or awards, ask about them.

MAJOR HINT: *What is personal to your prospect is often "hotter" than what is business.*

OK...you've looked...you've asked questions. Now... how do you hone in on that hot button? It always comes back to the hardest and most important part of all: listening! Here's how to "listen" for the answer:

- *Note the **first** thing your prospect alluded to.* Whether business or personal, our first response to a given question is typically what is foremost in our mind. Even if not the actual hot button, the answer will offer insight.
- *Listen for tone, particularly in his or her first responses.* There is a strong correlation between your prospect's tone and what she views as important. Tone...gestures...loudness...pace of speech...expressions...all are barometers of passion! Remember, every sale has an emotional dimension.
- *Pay careful attention to immediate and/or emphatic responses.* These are reflexive responses that suggest a "hot" subject...strong agreement.
- *Listen for repetition!* Something said twice or more is nearly always "top of mind" for your prospect. If it happens to also be a "first response," you're really on to something.
- *Pay attention when your prospect questions you.* When your prospect asks what you think about or how you would handle an issue that you just raised, it strongly suggests importance to your prospect.
- *Last but not least, listen for a long and drawn-out answer or story.* We tend to dwell on what is important to us. If your prospect is dwelling, you've identified an area of importance.

By now, if you've carefully done these things, you should be able to identify your prospect's hot button. It's time to push it!



Are my people appropriately paid?

How should I price a new position or a new incumbent to a position?

How does my salary fit the market place?

What we keep hearing is the need for compensation comparison data on Trust and Wealth Management positions. There are many reasons for this need including the need to retain quality people. Many of the other sources of compensation data are woefully lacking in Trust Industry comparisons.

So... We have introduced COMPCOMPARE™ as a companion service to TRUSTCOMPARE®.

For each position, you will receive average and median salary, salary ranges, bonus and incentive data and correlation analysis where appropriate. The report will also present demographically adjusted salary data that you can adjust to your own market using a cost of living adjustment factor.

Click [HERE](#) for more information.

To view a sample report (small or large trust departments) please contact:
Loyd Pohl at elpohl@pohlconsulting.com

Staff Article
TRUSTCOMPARE®
A High-level Review

by
Eric Timm

As the dust settles on another year of Trustcompare, I find it interesting to perform some high level analysis of the state of our subscribers' business. Looking at the trend data charts we implemented this year (showing 5 years of data), there is a noticeable across-the-board spike in the data between 2008 and 2009, corresponding with the financial crisis of 2008. Not terribly surprising, but what conclusions can we draw from analyzing subscriber data between 2009 and 2010? Have organizations been able to improve their bottom line and recover to similar profitability results as before 2008?

Believing a highly non-scientific study of the Trustcompare data might yield some interesting conclusions about the state of the trust industry over the past two years, I started with pre-tax profit. Table 1, below, shows the percent of Trustcompare subscribers who had either a positive or negative change in PTP from 2009 to 2010.

Table 1: Breakdown of Subscriber Change in Pre-Tax Profit, 2009 to 2010

Positive Change	73.5%
Negative Change	26.5%

Table 1 shows that a large majority of Trustcompare subscribers showed growth in their PTP results over the two years. This result certainly looks good for the industry, with close to three quarters of all subscribers showing a positive change in their pre-tax profit.

After pondering these results, I then wondered how

these organizations were able to grow their PTP over the time period, assuming that they could either raise revenues or lower expenses in order to affect their profit. Using the same table of subscribers, I then calculated a cross-tabulation of subscriber PTP changes versus changes in revenues, as shown in Table 2 below.

Table 2: Cross-tabulation of PTP and Revenue Growth, 2009 to 2010

	Revenue Growth		
<i>Pre-tax profit</i>	+	-	<i>Total</i>
+	69.4%	4.1%	73.5%
-	18.4%	8.2%	26.5%
Total	87.8%	12.2%	100.0%

Table 2 shows that 87.8% of subscribers were able to grow their revenues over the 2009-2010 timeframe. Of all subscribers with a positive change in PTP nearly 70% also experienced positive growth in revenues. It appears that those subscribers with positive PTP growth were able to do so by increasing their revenues. But revenue only tells half of the story--what impact did operating expense have on PTP?

Table 3: Cross-tabulation of PTP and Operating Expense Growth, 2009 to 2010

	Operating Expense Growth		
<i>Pre-tax profit</i>	+	-	<i>Total</i>
+	20.4%	53.1%	73.5%
-	10.2%	16.3%	26.5%
Total	30.6%	69.4%	100.0%

Table 3 is a crosstab comparing PTP growth versus operating expenses, and shows that the majority of subscribers with PTP growth also were able to reduce their operating expenses. Overall, close to 70% of subscribers were able to reduce their expenses from year-to-year.

The combination of revenue increases and expense reductions virtually guarantees growth in pre-tax profit,

and would be the textbook prescription for improving your bottom line. This raises the question of how many subscribers were able to do just that between 2009 and 2010? The answer is found in Table 4 below.

Table 4: Cross-tabulation of Revenue and Expense Growth, 2009 to 2010

<i>Revenue</i>	Operating Expense Growth		<i>Total</i>
	+	-	
+	26.5%	61.2%	73.5%
-	4.1%	8.2%	26.5%
Total	30.6%	69.4%	100.0%

Table 4 shows us that a smaller percentage of subscribers were able to achieve both revenue increases and operating expense reductions, but a clear majority were able to impact their pre-tax profit results by managing both their top and bottom line numbers. One additional area to consider is the change in assets over the same time period. Table 5 below shows the breakdown of PTP versus Assets.

Table 5: Cross-tabulation of PTP and Assets Growth, 2009 to 2010

<i>Pre-tax profit</i>	Assets Growth		<i>Total</i>
	+	-	
+	61.2%	12.2%	73.5%
-	18.4%	8.2%	26.5%
Total	79.6%	20.4%	100.0%

The results of this crosstab shows that subscribers with positive PTP growth also showed positive assets growth over the 2009 - 2010 period, and almost 80% of the total Trustcompare subscriber base showed an increase in assets.

Conclusions:

What conclusions can be drawn from this simple analysis? My conclusion is that there are few surprises revealed by this data, given that increases in revenues and decreases in expenses will usually result in an increase in

profits. Also, you would expect there to be some correlation between growth in assets and growth in revenues and a subsequent growth in PTP. However, I question if this growth can be achieved year over year, assuming that expense reductions are usually not sustainable over a longer time-frame. At some time, you either reach a point at which you cannot reduce expenses further or your organization will require a higher level of spending to support the growth in revenues.

What is surprising is that the data shows a very large percentage of subscribers who have increased their pre-tax profits over the 2009 to 2010 time period. Given the still uncertain state of the economy, a reasonable expectation would be that roughly half of all subscribers would show an increase in their PTP over the period. Although it is difficult to prove the exact reason for the large number of subscribers with positive PTP growth, Loyd will likely conclude that “Trustcompare subscribers have a greater interest in evaluating and understanding their performance and therefore are more likely to be successful than non-subscribers.” Assuming Loyd’s conclusion is correct, this makes a compelling case for becoming a Trustcompare subscriber.

In deference to my former statistics professors, I must note the following:

1. I did not perform any analysis of the results using standard statistical methods. Ideally, performing a chi-square test would indicate the degree of confidence that the Trustcompare subscriber data is statistically different than a randomly generated group of data, thus providing some level of certainty that the conclusions are valid. Without these tests, the results are merely conjecture rather than proof (I used to get away with this in college and graduate school some of the time, so I am not too worried about the methodology here). *cont.*

2. Since this analysis is based on Trustcompare data, it should only be applied to organizations who fit the profile of the typical Trustcompare subscriber--trust company subsidiaries of banks/bank holding companies or stand-alone trust companies.

The Last Word

with LOYD POHL

“The regulators made me do it...” This is a time-honored excuse that we in banking have been using for decades. Sometimes it is “real” – sometimes it is cover for what we need to or want to do anyway. Furthermore, I submit that sometimes the regulators actually have a basis for their suggestions.

Remember pre-crisis? One of the regulatory themes was succession planning as part of organizational strategic planning. A number of organizations embarked on a process of formal succession planning at the “suggestion” of their regulator. This was a good idea anyway – in the projects we were involved with, there were always important issues uncovered or addressed as an organization evaluated its depth chart in each of the key positions.

One recent theme from the regulators – in the risk management category – is vendor management. The question from regulators: Are your core vendors stable and valuable partners?

The suggestion from regulators: You should consider conducting a formal due diligence process at renewal, if considering a change or more often if appropriate. This suggestion comes with varying degrees of forcefulness.

Is this a good idea anyway? Absolutely! Here are some thoughts about a formal Request for Proposal/ Due Diligence process:

- Understand that there is a difference between conducting a due diligence process with a current vendor with whom you are satisfied and doing a vendor selection process.
- In a selection (or renewal) process, the vendors will take you more seriously if the RFP process is more formal. That will lead to greater value for your organization in the new contract.
- Part of the formalization is having a 3rd party facilitate the RFP process. I can’t prove it statistically but I know anecdotally that “pencils get sharpened more” when there is a 3rd party doing the RFP.
- The 3rd party must have done this before – you are paying for the experience and tools they already have accumulated.
- While it is a common goal to get a reduced price/cost in the process, it is also common to get added value from your vendors. It is cheaper for them to add value in the form of added services than to reduce price.

This whole topic is of interest to us since we have an array of due diligence programs available for vendors/ services such as CRM/CMS, Broker Dealer (TPM), core Trust accounting systems and Trust investment vendors including advisory and trading. As you might expect, we have been doing a large number of these types of projects recently, and it is clearly in some cases because of “suggestions” made by the regulators. Thank you regulators! In other cases it is an acknowledgement that it is actually a good business practice to make sure your key business partners are providing you maximum value!


Chief Executive Officer

Sales Organization Leadership Development

The Sales Management Workshop
April 12 & April 13, 2012
Hilton Lisle/Naperville
3003 Corporate West Drive • Lisle, IL 60532

Are your salespeople and relationship managers as good as they could be? Are they as good as they **should** be? If not, who is helping them get better? How is your organization giving them the skills, confidence, and background to be effective?

It is, quite simply, impossible to build a successful sales culture without the fundamental tools of sales management. All too often, we take our most successful salesperson and make him or her the manager. In the process, we lose our best salesperson and get a mediocre (if we're lucky) manager. Then we go on to throw empty slogans and temporary training ideas and silly sales promotions at the problem to try and find a solution.

If you want to build a sales culture; if you want to have a successful sales force; if you're looking for continual improvement of the entire staff, you need sales leadership. You need leadership that provides feedback and direction and measurement and help. Unfortunately, too few "sales managers" truly understand the importance of leading and managing the process.

We can help your people become better managers. We especially can help those managing sales functions become better sales managers. If they're already good, they can become even better by brushing up on those essential skills in our two-day program. **Sales Organization Leadership Development**, the sales management workshop, is designed for every level of management—CEOs; COOs; managers of commercial, trust, and retail departments; branch managers; and managers of staff functions, such as marketing and human resources.

Sales Organization Leadership Development (or SOLD) provides valuable tools to help participants learn how to:

- Select **people** with a better chance for success
- Set **goals** designed for success
- Coach and **counsel** for increased sales and/or effectiveness
- Implement effective **feedback** systems
- Conduct **sales** meetings that mean something
- Establish **reward** and recognition programs
- And much more.

This is not simply a classroom exercise. We'll provide all attendees with the tools they need for success and the confidence and methodology they need for a successful implementation. In today's fast-paced and super-competitive marketplace, no organization can afford to be without skilled managers at every level. Seldom do managers—especially new managers—receive the training they need in order to be truly successful. This could be one of the very best two-day investments you ever make.

If you have additional questions about The Sales Management Workshop, please call **Loyd Pohl** at **(800) 677-7432** ext. **225**. Only one open registration workshop is held each year. If you have eight or more possible registrants, ask us about an "in-house" workshop in your area.

Pohl Consulting and Training, Inc.

Robert H. Franke & Associates
www.pohlconsulting.com

Robert H. Franke & Associates

**Sales Organization Leadership Development (SOLD)
Two-Day Sales Management (Coaching) Workshop**

Day 1

8:00 - 8:45	Welcome and Introduction
8:45 - 9:45	The Role of Sales Management and Sales Managers
9:45 - 10:00	Break
10:00 - 12:00	Coaching and Counseling – The Critical Factors Coaching and Counseling – The Skills/The Steps
12:00 - 1:00	Lunch Break
1:00 - 1:30	Coaching and Counseling (continued)
1:30 - 2:30	Building the Sales and Service Team
2:30 - 3:00	Roleplays as a Learning Tool
3:00 - 4:30	Roleplays – Counseling the Underachiever Roleplays – Praising the Performer
4:30 - 5:00	Roleplay Observations – What Did We Learn?

Day 2

8:00 - 8:45	Developing and Presenting Sales Meetings
8:45 - 9:15	Upward Influencing
9:15 - 9:30	Break
9:30 - 10:00	Call Programs and other Sales Management Tools
10:00 - 11:00	Client Management Systems
11:00 - 12:00	Goal Setting (Defining the Sales Task)
12:00 - 1:00	Lunch Break
1:00 - 1:15	Review Roleplay Process
1:15 - 3:30	Roleplays – Pre-Call Planning Roleplays – Post-Call Review Roleplays – Goal Setting
3:30 - 4:00	Roleplay Observations – What Did We Learn?
4:00 - 4:30	Wrap Up

SALES MANAGEMENT WORKSHOP REGISTRATION FORM

Please send the completed registration form and a check for \$895* (lunches included in base price) for each workshop participant to:

Robert H. Franke & Associates
PO Box 287
Rochelle, IL 61068

*\$845 if registration received by March 5, 2012.

Please enroll me in the Sales Management Workshop on April 12 & April 13, 2012.

Registrant:

Nickname:

Title:

Department:

Company:

Street Address:**

City:

State:

ZIP:

Telephone: ()

Fax: ()

E-Mail:

** **NO P.O. Boxes PLEASE!** UPS cannot deliver material to post office boxes.

Hotel and Ground Transportation Reservations:

To reserve a room at the Hilton Lisle/Naperville, please click the link below to make your reservation online.

http://www.hilton.com/en/hi/groups/personalized/N/NAPHIHF-CPOH-20120411/index.jhtml?WT.mc_id=POG

You may also contact the Hilton directly at 630/505-0900.

*Please make sure to enter our Group Code - **CPOH** - to receive our discounted hotel rate.*
Reservations must be made by March 20th, 2012 to receive the special group rate.

The Hilton Lisle/Naperville recommends Windy City Limousine as their transportation service from both major airports. Please contact Windy City Limousine directly for their rates and reservations at 1-866-949-4639.

Please make your reservations with Windy City Limousine at least 24 hours in advance.

The workshop begins promptly at 8:00 AM; we suggest you arrive the evening before.

Cancellation Policy: Cancellations accepted up to **30 days** prior to Workshop with a **\$50 Service Charge**. Substitutions only accepted thereafter.

Pohl Consulting and Training, Inc.

Robert H. Franke & Associates
www.pohlconsulting.com

RELATIONSHIP SALES WORKSHOP

May 15 – 18, 2012

Hilton Lisle/Naperville • 3003 Corporate West Drive • Lisle, Illinois

If your current or desired position in your organization carries an expectation that you build relationships that enhance company revenue ...

This workshop is for you!

If you are a sales veteran who has reached a production plateau ...

This workshop is for you!

If sales presents a new career challenge

This workshop is for you!

If you are working harder at sales and enjoying it less

This workshop is for you!

Loan Officers
Private Bankers
Personal Bankers
Sales Managers

Trust Officers
Branch Managers
Insurance Agents
Sales People

Investment Representatives
Mortgage Originators
Wealth Management Officers
Business Development Officers

Wealth management models, private client service models, integrated models, and traditional product line models each depend on relationship management skills and a sales process that allows the staff to maximize its success. The skills and processes taught in this workshop can give any individual the opportunity for that success. Best of all, anyone who is in the financial services business in order to help people get what they want in life will discover a higher level of job satisfaction.

We emphasize the process (while also practicing skill enhancement) because we see this process as the missing piece for people and organizations that have reached a plateau or faltered in their sales development efforts. This workshop provides a true impact event—it creates a total experience of learning and reflection to truly affect your future. If what is learned is applied consistently, it will have a very positive impact on your sales and retention results- and on your career!

The investment for this workshop is \$1095* for each participant. Lunches and all workshop materials and tools are included in your investment. Participants are responsible for their travel, lodging, and any meals outside the workshop.

* Early discount registration price of \$995 if registration and check are received by April 9, 2012.

Pohl Consulting and Training, Inc.

Robert H. Franke & Associates
www.pohlconsulting.com

Testimonial!

After 25 years, I had been through about every kind of sales training you could imagine. It had all been the same: fidget in a hot/cold room for 3 or 4 days, then go back to the office and try to clean up the earthquake that had hit in my absence. I remember grumping that 'my customers come first, and I can't be doing all this stuff or they would suffer.'

I took a chance and started using what I learned by exploring my book of business in a small way. That way, I figured I could still do what made me happy and at least try out this new process, too. As I picked up the phone, scheduled meetings and started listening and probing, a surprise number of those clients started revealing that they had other assets and needs that I had not even dreamed were there!

*All of a sudden, in a short period of time, my original view of how to serve my customers and be happy in my job had changed radically. Now I see that they are best served if they are completely served- **all** their needs and goals identified and explored, a strong feeling of trust and confidence created, and a sense of personal caring communicated to them (regularly!). Today, I find I look forward to making calls and growing relationships; it's fun to see how much I can learn in a single call, to nurture the relationship and to see customer confidence build.*

WORKSHOP AGENDA

Day 1

8:00 – 9:15	Welcome and Introduction
9:15 – 10:15	The Right Mental Attitude – About Sales/Customers/Products
10:15 – 10:30	Break
10:30 – 11:00	The Right Mental Attitude – About Yourself
11:00 – 12:00	The Relationship Sales Process (includes Quiz review)
12:00 – 1:00	Lunch
1:00 – 2:15	The Psychology of Selling – Components of a Relationship
2:15 – 2:45	The Sociology of Selling – Life Cycles
2:45 – 3:00	Break
3:00 – 4:45	The Discovery Process
4:45 – 5:15	Case Study Assignments

EVENING HOMEWORK

Study assigned cases

Day 2

8:00 – 10:30	Behavior Modeling Roleplay (Fact Gathering)
10:30 – 5:00	Individual Fact Finding Role Plays (In Small Groups)

Day 3

8:00 – 9:00	Review of Profiling Experience
9:00 – 9:30	Finding Preferred Helping Opportunities
9:30 – 10:15	What Makes a Buyer Buy?
10:15 – 10:30	Break
10:30 – 12:00	The Presentation
12:00 – 1:00	Lunch
1:00 – 2:30	Behavior Modeling (Presentation)
2:30 – 5:00	Case Planning Workshop

Day 4

8:00 – 8:30	Responding to Objections
8:30 – 2:00	Individual Presentation Roleplays (In Small Groups)
2:00 – 2:30	The Relationship Management Circle
	Wrap Up

RELATIONSHIP SALES WORKSHOP REGISTRATION FORM

Please send the completed registration form and a check for \$1095* (lunches included in base price) for each workshop participant to:

Robert H. Franke & Associates
PO Box 287
Rochelle, IL 61068

Or you may fax the registration form to: 815/561-3573

*Early discount registration price of \$995 if registration and check are received by April 9, 2012.

Please enroll me for the following area in the May 15 - 18, 2012 Sales Workshop:

(Your case assignment and planning materials will be based on the area you select)

_____	Private Banking	_____	Institutional Investment
_____	Retail Banking	_____	Employee Benefits
_____	Commercial Banking	_____	Personal Trust
_____	Investment Rep / Advisor	_____	Insurance Agent

_____	Registrant	_____	Nickname		
_____	Title	_____	Department		
_____	Company				
_____	Street Address**				
_____	City	_____	State	_____	ZIP
_____	Telephone ()	_____	Fax ()		
_____	E-Mail Address				

** NO P.O. Boxes **PLEASE!** UPS cannot deliver material to post office boxes.

Hotel and Ground Transportation Reservations:

To reserve a room at the Hilton Lisle/Naperville, please click the link below to make your reservation online.

http://www.hilton.com/en/hi/groups/personalized/N/NAPHIHF-CPOL-20120515/index.jhtml?WT.mc_id=POG

You may also contact the Hilton directly at 630/505-0900.

*Please make sure to enter our Group Code - **CPRS** – to receive our discounted hotel rate.*

Reservations must be made by April 16th, 2012 to receive the special group rate.

The Hilton Lisle/Naperville recommends Windy City Limousine as their transportation service from both major airports. Please contact Windy City Limousine directly for their rates and reservations at 1-866-949-4639.

Please make your reservations with Windy City Limousine at least 24 hours in advance.

The workshop begins promptly at 8:00 AM; we suggest you arrive the evening before.

Cancellation Policy: Cancellations accepted up to **30 days** prior to Workshop with a **\$50 Service Charge**. Substitutions only accepted thereafter.

Pohl Consulting and Training, Inc.

Robert H. Franke & Associates
www.pohlconsulting.com