

RELATIONSHIP SALES WORKSHOP

November 1st – 3rd, 2023

DoubleTree by Hilton Lisle/Naperville • 3003 Corporate W. 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
Wealth Advisors

Investment Representatives
Mortgage Originators
Financial Advisors
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 \$1495* 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 \$1295 if registration and check are received by October 13th, 2023.

Pohl Consulting and Training, Inc.

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.*

RELATIONSHIP SALES WORKSHOP

Day 1	7:30-8:00	Please join us in the meeting room for a <i>Continental Breakfast</i>
	8:00-9:00	Introductions and Welcome
	9:00- 10:00	The Right Mental Attitude About Sales, Customers, Your Products and Yourself
	10:00-10:15	Break
	10:15-10:30	Homework Review
	10:30 -12:00	Methodology and Relationship Sales / The Process Skills Development / The Psychology of Selling
	12:00-1:00	Lunch
	1:00-2:00	The Sociology of Selling / What Makes a Buyer Buy?
	2:00-2:15	Break
	2:15-3:00	Effective Discovery Techniques and Process
	3:00-4:45	Demonstration Role Play (Discovery)
	4:45-5:00	Case Study Assignments
	Evening Homework	Study Case Assignments
	Day 2	7:00- 7:30
7:30-12:15		Individual Discovery Role Plays (In Small Groups)
12:15- 1:15		Lunch (Working Lunch) What did you learn?
1:15 - 2:15		Demonstration Role Play (Presentation)
2:15 - 3:15		How to Make an Effective Presentation
3:15 - 3:30		Break
3:30 - 5:00		<i>Case Planning Workshop & Presentation Preparation</i>
Evening Homework		Practice and Fine-Tune Presentation Prepare Your Visuals
Day 3		7:30- 8:00
	8:00- 8:45	Effective Responses to Objections
	8:45- 9:00	Presentation Review / Roleplay Setup
	9:00-12:30	Individual Presentation Role Plays (In Small Groups)
	12:30- 2:00	Wrap Up (Working Lunch)
		Graduation!

RELATIONSHIP SALES WORKSHOP REGISTRATION FORM

Please send the completed registration form and a check for \$1495* (lunches included in base price) for each workshop participant to:

Pohl Consulting and Training, Inc.
PO Box 287
Rochelle, IL 61068

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

*Early discount registration price of \$1295 if registration and check are received by October 13th, 2023.

Please enroll me for the following area in the May 10-12, 2023 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:

The DoubleTree by Hilton Lisle/Naperville is conveniently located near O'Hare and Midway airports. The hotel can be reached at 630-505-0900.

As a participant in this Workshop, you will receive a discounted rate on your hotel accommodations. If your reservations are made by phone, please mention that you are with Pohl Consulting and Training for the Relationship Sales Workshop to receive the hotel discount.

The workshop begins promptly at 8:00 AM on Day 1; we suggest you arrive the evening before.

For further information on the DoubleTree by Hilton Lisle/Naperville or the Relationship Sales Workshop, please contact our office. We can be reached at 800/677-7432 ext -4001-

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.

www.pohlconsulting.com