

Winning At Prospecting—Getting Beyond Small Talk

Overview



Bankers learn to engage and energize prospects, referral sources, and community connectors in conversations that support continued discussion and follow up, increasing the likelihood of identifying issues that lead to potential new business and referral opportunities.

Clarity Advantage Corporation is a business consulting firm. We help banks implement and execute sales strategies to generate more profitable relationships faster. Banks accelerate sales by focusing on their value propositions, improving sales processes, and boosting sales manager effectiveness.

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PROGRAM PURPOSES:

Engage Prospects and COIs In Conversations that Count

Bankers waste precious time and opportunities when they can't move prospect or COI conversations beyond small talk. **Getting Beyond Small Talk** helps bankers:

- “Tip” conversations from casual chat to thought-provoking discussion about business or personal opportunities or concerns.
- Identify reasons to continue conversation at a later time.
- Invite conversation partners to follow-up appointments.

Learning Activities – Classroom

CLASSROOM

During the half-day classroom session, participants complete a series of small group learning activities, practices, and discussions through which they:

- **Feel the Lull.** Using improvisational acting exercises, participants complete a “greeting” exercise in which they introduce themselves to one another under different creative circumstances. During the debrief, the workshop facilitator asks the participants about the natural lull in a small talk conversation. The question is: How do you get beyond small talk?
- **Develop Deeper Conversation.** Using The Conversation Path—Clarity’s five-stage conversation flow: Start, Connect, Pursue, Tip, and Continue—participants learn to engage prospects or referral sources in conversation, then “tip” the conversation to more substantive issues.
- **Identify Reasons to Continue.** Participants consider what they learned in their “tipped” conversations, identify strong reasons to continue, and choose next steps to build relationship and continue conversation.
- **Craft Follow-Up Emails and Voice Mails.** Participants apply the Conversation Path model to craft and critique engaging email and voice mail follow ups to conversations, inviting prospects or referral sources to meet again for further discussion. After critiquing the messages, participants call their own voice mails to leave their messages. Then, they listen to the messages they have left and identify shortfalls they need to address when preparing messages in the future.
- **Complete Action Plans.** Participants define situations and steps they’ll take to engage past or new prospects or COIs in discussion, “tip” the conversations to deeper issues, and follow up.