

Winning At Prospecting—A Modular Approach

Overview



Business-focused sales team members develop broader relationships, faster by focusing on introductory conversations.

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:

Increase Bankers' Flow of Qualified Business Banking Prospects By:

- Focusing prospecting efforts
- Engaging network members more actively
- Improving banker conversations with prospects and COIs
- Reinforcing the potential value of bank services
- Asking for referrals and introductions more effectively

Almost every banker struggles to attract enough qualified prospects. The reasons vary: lack of confidence in the value of their solutions, inability to sustain and expand conversation beyond pleasantries, insufficient focus, failure to network strategically or consistently, and clumsy phone work. Clarity offers a suite of one-half day to full-day workshops to address these challenges. The workshops focus specifically on:

Building Value, Earning Trust

Bankers develop confidence and a clear, strong sense that they and their bank products (beyond loans) bring value to the table and that they have the "right to be there" with business owners, engaging with them to help solve problems.

Getting Beyond Small Talk

Bankers learn to engage and energize prospects, referral sources, and community connectors in conversation and to 'get beyond small talk' to issues of substance that support continued discussion and follow up, increasing the likelihood of identifying issues that lead to potential new business and referral opportunities.

Building Networks that Feed Us

Cold-calling is a consequence of insufficient networking. Bankers learn strategies to develop webs of relationships with community members who gain from those relationships and who will spread the word about them. Bankers practice conversation skills critical in asking for referrals or introductions.

Hello? Hello?

Bankers learn how to prepare for and approach prospects, connectors, or referral sources by telephone or email both after an introduction and with no introduction, then participate in practice opportunities to increase their execution effectiveness.

Learning Activities

CLASSROOM TRAINING

Workshop 1 – Building Value, Earning Trust (half day)

Many bankers don't "believe in their souls" that they have a "right to be there" with business customers and prospects. As a result, their prospect approaches lack purpose and conviction or rely on 'hope they like it' product pitches. During this workshop, participants will have their knowledge and confidence levels boosted by focusing on:

- Business owners' business financial management challenges and their impact on the business owner
- Bank products' value in addressing those challenges and improving owners' ability to run their businesses
- Linking bank solutions value and business owner challenges in compelling conversations

Workshop 2 – Getting Beyond Small Talk (half day)

Conversations with prospects and COIs often don't move beyond small talk about kids and community events. This workshop helps participants engage prospects, referral sources, and other community connectors to 'get beyond small talk,' thereby increasing participants' capabilities to:

- Engage and energize strangers, friends, and familiar faces
- "Tip" conversations from comfortable small talk to thoughtful discussions about businesses and/or topics that lead to mutual relationship building
- Build a personal or business foundation for continuing the relationship

Workshop 3 – Building Networks that Feed Us (half day or full day)

The networking universe is fluid and constantly changing. Bankers need new skill sets to allow them to thoughtfully and purposefully plan and develop webs of relationships with community members. This workshop improves participants' skills at:

- Grasping new rules and norms of supercharged networking
- Distinguishing high-priority prospects from others
- Developing strategies for expanding personal networks
- Using LinkedIn to meet prospects and potential referrers
- Nurturing and sustaining network relationships
- Increasing effectiveness in business networking conversations

Workshop 4 – Hello? Hello? (half day or full day)

Up-front planning and ample practice are critical to successful telephone prospecting outcomes. Bankers will learn a purposeful planning approach to telephone prospecting and will practice skills that lead to successful execution of telephone prospecting. In this workshop, participants will learn:

- Five reasons why "calling cold" is not so hot
- Pre-call planning techniques and develop "reasons to talk"
- How to work with gatekeepers
- Ways to spark conversation, once connected
- How to respond to "no" or "not now"
- How to plant seeds for continued contact
- Ways to drip feed, thereafter