

Outside Calling School

Program Overview

The 2-lesson **Outside Calling School** will deliver the most up-to-date selling techniques to help you and your company deliver loan and deposit results. You will go through the selling process to identify how to gain the trust of your client, gain a larger share of wallet, and sell what your client truly needs. We will also address how to effectively manage the pricing discussion, how to overcome objections, and how research and profiling the client/ prospect will improve targeting, prospecting and presentations.

The school will focus on three main areas:

1. Outside Calling
2. Negotiation Skills and Selling at Higher Margins
3. Researching and Profiling Your Clients and Prospects

Agenda

- Calling successes & challenges
- **STEP 1: Pre-Call Planning**
 - ⇒ Getting out of the office both virtually and in person
 - ⇒ Call planning on top clients & prospects
 - ⇒ Gaining the virtual or in person appointment
 - ⇒ The initial meeting
 - ⇒ More, Better, Different, Less Clinic
 - ⇒ Do we use technology or meet in person?
 - ⇒ Plan what to bring on the call
 - ⇒ Plan bridging and introductory comments
- **STEP 2: The Virtual or In-Person Encounter**
 - ⇒ Get them talking!
 - ⇒ Listening and communicating how you can help
 - ⇒ Making a recommendation and asking for the business
 - ⇒ Earning referrals
- **STEP 3: Post Call Follow Up**
 - ⇒ Expanding your notes to capture the call
 - ⇒ Calendaring follow up activities
 - ⇒ Drafting a thank you note
 - ⇒ Assessing the call
 - ⇒ Compete on anything other than price
 - ⇒ The value proposition?
- Premium pricing
- Negotiating techniques
- War Games – Handling objections
- Draft an Action Plan for skills transfer

Who should attend?

Any professional who has client contact would benefit from this seminar. This includes the branch staff, commercial and consumer lending staff, trust and investment staff, and the mortgage staff.