

# OUTSIDE CALLING SCHOOL

PRESENTED BY FOCUSED RESULTS



Upcoming  
Spring Series!

LIVE VIRTUAL  
TRAINING

## 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.

## TOPICS:

- 1  **OUTSIDE CALLING**
- 2  **NEGOTIATION SKILLS AND SELLING AT HIGHER MARGINS**
- 3  **RESEARCHING AND PROFILING YOUR CLIENTS AND PROSPECTS**

## 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 even during this “new-normal” economy.

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.

# PROGRAM AGENDA

## ◀ STEP 1: PRE-CALL PLANNING

- Calling successes and challenges
- 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: 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
- Premium pricing
- Negotiating techniques
- War Games – Handling objections

## 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?
- Draft an Action Plan for skills transfer

# MEET YOUR PRESENTER

# JENNIE SOBECKI

Jennie Sobecki is Owner and CEO of Focused Results, a sales and marketing strategy, consulting, and training firm concentrating on results-driven process consulting and training experience in community banks and other financial institutions. An expert in designing and implementing sales efforts and processes, she designs solutions to drive top line growth through better utilization and training of existing sales forces, including sales management.

Jennie is a graduate of Indiana University and has a certificate in consulting services from Ball State University. Prior to joining Focused Results, she was Director of Sales and Marketing for a \$3 billion bank holding company, Sales Manager for a high-performing mid-level Indianapolis bank, and Director of Corporate Training for a large Midwest insurance company. A charismatic speaker and consultant, Jennie consults with numerous financial service organizations on revenue, sales, sales leadership, and organizational performance.



## PROGRAM DATES:

### Summer - Eastern

1 - July 11  
2 - July 18

### Fall - Eastern

1 - October 10  
2 - October 24

### Spring - Eastern

1 - February 6  
2 - February 13

### Summer - Pacific

1 - July 10  
2 - July 31

### Fall - Pacific

1 - October 2  
2 - October 9

### Spring - Pacific

1 - February 5  
2 - February 19