

# WOWING THE CLIENT

PRESENTED BY FOCUSEDRESULTS.BIZ

## PROGRAM OVERVIEW

Our workshop on Wowing the Client covers the skills needed by frontline branch professionals as they care for clients and help them realize their financial dreams.

We will explore the trends in banking today, including:

1. How technology is revolutionizing our business.
2. Becoming a more vibrant member of the team, resulting in growing the branch.
3. Listening to clients' dreams and ensuring they get the best product options to help them.
4. Being an ambassador for growth, becoming the active dream builder that our clients need.

The experience is top rate. We have branch professionals from across the country in the session, so during break outs you will learn national best practices in frontline banking.

Please join us in your professional journey as you become the best of breed frontline branch professional in your market!

## MEET YOUR PRESENTER



Jennie Mitchell 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.

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.

# WOWING THE CLIENT

## OBJECTIVE:

Addresses the needs, wants, and expectations of the new, digital, and younger clients and employees.

## PARTICIPANT KEY SKILL TRANSFERS AND TAKEAWAYS:

1

LEARNING HOW TO ASK GREAT CLIENT QUESTIONS.

2

WORKING WITH CLIENTS TO IDENTIFY GOALS AND DREAMS.

3

SELLING APPROPRIATE PRODUCTS TO ACTUALIZE CLIENT DREAMS AND GOALS.

## PROGRAM AGENDA

- Expectations from top clients, whether they visit us at the branch or not
- Growing the client relationship through Onboarding and All-Aboarding
- Being able to uncover clients' dreams
- Establishing baseline standards
- Creating the ultimate client experience
- Great Cross-Selling: Asking great questions to get the client talking to discover dreams
- Data-driven decision making to convert more relationships into business
- Streamlining your work processes
- Gen Z and Millennials: managing relationships with coworkers and clients
- Develop leadership skills to wow your employer
- Action plan for skills transfer back to the job