Focused Results

2018 First Quarter Webinar

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April 6 – Shift Happens: Moving from an Order-Taking Mode to a Needs-Based Sales Focus

Program Overview

Companies cannot keep operating under the old ways, processes, and practices of the past, where professionals wait on the business. When you move from order-taking to sales engagement, your company will see ROI's of 100 to 1 or even more Within the first full 60 days of the process, your ROI will be 20-30%. In this energizing 90 minute webinar, you will learn which key elements of a sales process you must include to drive the results you need and keep your staff motivated.

Agenda

- Branding the process to your company
- Why companies fail at sales process efforts
- The role of the CEO in sales culture
- Assessing the strengths and weaknesses of the company and your sales team
- Results driven sales training
- Sales meetings and sales accountability
- Coaching to drive results
- Call plans: clients, prospects, referral sources, profiling them all
- Tracking to stay on track
- Rewarding success
- Best sales practices
- Success stories

Who should attend?

CEO's, Presidents, EVP's, Senior VP's, and VP's of commercial lending, mortgage and consumer lending, branch administration, marketing, wealth management, and anyone responsible for driving sales results in a financial institution.

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April 13 – Winning Onboarding Approaches

Program Overview
Market conditions will provide more pressure on financial institutions to increase revenue with new client relationships. Onboarding should be one of the most important strategies to hit revenue goals for this year and next. Onboarding goes beyond the welcome letter and a one call follow-up. This webinar describes low cost, winning approaches to client retention and cross selling additional products and services, even without a CRM or MCIF software or system.

If you are looking to create an onboarding program, enhance your existing program, or create an “intelligent system” then this webinar is for you. We will cover:

Agenda

- Is the first 90 days fast enough?
- Who is your client, really?
- A winning image
- Cross-sell for increased wallet share
- The most likely products
- Onboarding metrics
- Retail and commercial onboarding
- Onboarding Process Sample
- “Intelligent” onboarding

Who should attend?
Financial institution marketers, marketing directors, vice presidents of marketing, retail executives, branch managers, and anyone else responsible for the onboarding and follow-up processes in a financial institution environment.

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April 20 – Rethinking Branch Delivery

Program Overview

The branch of the future is vitally important to a financial institution and to the client. The financial institution and the branch must evolve as the client rethinks his use of technology and how he uses the branch. We must redesign the branch delivery system as transactions and traffic decrease, and we look how best to deliver advice and recommendations to our clients to improve their financial positions. This fast moving and entertaining webinar will examine:

Agenda

- So, what's this going to look like?
- The branch through the eyes of the client
- Thinking retail delivery versus branch delivery
- The branch model mix
- Think local
- Trending data
- How about just a makeover?
- The new branch staff

Who should attend?
Financial Institution executives including Presidents, EVP's, Senior VP's, VP's of Retail and Branch Operations, Branch Managers, and anyone responsible for the branch system in a financial institution environment.

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April 27 – Building an Effective Referral Program

Program Overview

Most financial service professionals, both in retail and in commercial, are held back from asking for referrals because they are afraid of looking like they are rude to ask, or looking like they are begging for the business. The truly successful professionals make referrals part of their business, and provide value to their clients, by asking for and giving referrals and making their clients successful. In this fast-paced webinar, you will learn how to design a referral system that will make your professionals look good, be seen as the "go to" person, and be the key person to know in our industry. Referrals take less time, because the client or prospect already understands what you do, because your contact or client has already clued them in.

Agenda

- The internal referral process for retail
- The target niches
- Your differentiator
- Expect referrals - from your client and from you!
- 5 key steps in a great referral system
- Seminars, workshops and networking events
- Strategies to ask for the referral
- The secret life of testimonials
- How to make your clients and referral sources look and feel like heroes
- Referral tracking

Who Should Attend?

If you are charged with developing a referral system or are looking to get ideas to jump-start your existing system, then this webinar is for you. Senior Lenders, Senior Retail Executives, branch managers, lenders, mortgage originators, trust and investment officers, business development officers, and others, this webinar will help build your referral pipeline.

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May 4 – Making More Money out of Wealth Management

Program Overview

Low interest rates are still squeezing financial institutions. Wealth management programs can help profitability by bringing in new clients, or by bringing in fee income from higher income clients. Wealth management is also a great way to broaden and strengthen existing relationships with business owners that have loans with the company.

This fast-paced seminar will examine how the financial institution can compete for a larger share of the market with the regionals and nationals along with money management and investment firms. We will examine the leading models for offering wealth management, and the expected revenue you should be deriving from each model. We will also cover:

Agenda

- Socioeconomic status and the need for wealth services
- What if the client lives longer than expected?
- Where is this money residing?
- What are the financial and behavioral cues?
- Establishing a referral plan
- The advisor, the mixed model, and the robo – what revenue to expect
- The importance of female investors
- Setting an effective wealth management strategy
- And much more!

Who Should Attend?

CEO's, CFO's, COO's, wealth managers, branch managers, VP's of retail, VP's and marketing managers, and any others responsible for increasing non-interest income in a company.

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May 11 – Converting Branch Visits into Sales

Program Overview

Growing your company by converting more visits into sales, is more than just a sales number. To increase conversions and sales, you have to provide a consistent and unique experience for the client and the prospective client. The client of a financial institution is multi-connected to your company, more informed, and more demanding.

Financial institutions must overcome these challenges to become more “shoppable.” Shoppability then becomes transforming the needs, wants, and desire of the client into a purchase. The ultimate goal is to delight the client by providing a great experience that provides expert advice and assistance, creates a strong sense of community, and a easy to understand and streamlined process. In this fast-paced webinar, we will examine:

Agenda

- Merchandising your products
- Signs and other aids
- Easy organization and presentations
- Cut clutter
- Product benefits
- Showcase new apps and products
- Using convenience to sell
- Making clients delighted
- Expertise and advice
- Flexibility
- Measuring and managing

Who Should Attend?

Any branch manager, assistant branch manager, head teller, Sr. VP, VP, AVP of Retail, Regional VP's or Regional branch managers, and anyone else involved in the efficiency and service delivery in the retail branch environment in a financial institution.

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May 18 – They're Here – iGen is in Your Financial Institution

Program Overview

Gen Y, the iGen is invading your company, and by 2020 will be 40% of clients. They're savers and investors. They're fickle. They've killed Aeropostle and PacSun. They glorified Chipotle, and then murdered them. So how do you appeal to the iGen without "breaking the bank?"

Our entertaining webinar will help you determine specific actions to maximize the experience, and to increase the effectiveness of your sales efforts. Companies that embrace some of the ideas, techniques, and strategies discussed, will grab the lead over the competition.

Agenda

- Behind the scenes
- Key purchasing data for iGen
- Volunteerism and Entrepreneurship
- Social media approaches
- Creating adult moments
- Retention tactics
- iGen and the client relationship
- 2017 and beyond

Who should attend?

Senior executives, executives, vice presidents of retail, consumer lending, wealth management, branch management, branch managers, directors of marketing, marketing coordinators, and anyone responsible for improving the experience or for increasing client volumes in a financial institution.

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May 25 – Relationship Selling Still Works

Program Overview

Companies cannot keep operating under the old ways, processes, and practices of the past. Small business, the bread and butter of community financial institutions, is increasingly moving to online resources for financial products and services. Companies that make the move to social media and online resources are the ones that will succeed in an increasingly competitive environment. In this energizing 90 minute webinar, you will learn which key elements of a social sales engagement process you must include to drive the results you need and keep your staff motivated.

Agenda

- Creating the advisory environment
- Key client data
- What digital products make sense
- Integrating your financial institution and sales team with social
- LinkedIn leads
- Your clear strategy
- Training for social media selling
- Coaching to drive results
- Tracking to stay on track
- Rewarding success

Who should attend?

CEO's, presidents, EVP's, Senior VP's, and VP's of lending, branch administration, marketing, and anyone with the responsibility of driving sales results through relationship selling in a financial institution.

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June 1 - The Evolving Role of the Branch Manager

Program Overview

What does your branch have that alternate branch channels like mobile banking don't? The branch has you and your people. As the number of branch transactions continues to fall, financial institutions must reassess the role of the branch manager. Companies must invest in the manager, giving him or her the right people, tools, client goals, and sales goals, and step back and watch the results change into a dynamic source of profitability.

This exciting webinar will focus on the next generation manager who will be leading the transition to client relationship management, and to managing an active advisory environment for the client to achieve financial goals. The next gen manager will be leading this vital transformation. The program will focus on the critical skills and expectations that need to be developed to ensure that the next generation branch manager will exceed expectations and goals set for him or her.

Agenda

- The role of cross-selling/servicing to enhance the client relationship
- Transitioning the retail client to self-service and mobile channels
- How the next generation branch will affect client service and retail delivery
- Measuring productivity and efficiencies
- Next generation leadership and coaching
- The advisory environment and a proactive retail lending philosophy
- The branch is your financial institution or your store
- Tools to help you transition to the new model

Who Should Attend

Any branch manager, assistant branch manager, head teller, Sr. VP, VP, AVP of Retail, Regional VP's or Regional branch managers, and anyone else involved in the efficiency and service delivery in the retail branch environment in a financial institution.

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June 8 - Selling in a Highly Competitive Market

Program Overview

The financial institution is uniquely positioned to offer loan opportunities to small business and commercial borrowers. This webinar will look at how to position your business and commercial lending to enhance loyalty with your current clients, peel away satisfied clients from your competition, and design your marketing and sales approaches to fend off the larger competitors and non-financial institution lenders. We will discuss identifying profitable opportunities, which businesses are likely to buy, and which lines of business are worthy of a niche play. We offer discussion, examples, and exercises to help you drive revenue and growth. This engaging webinar will help you identify the key things that will help you keep your pipeline full of top clients and prospects.

Agenda

- Reinvigorate dormant clients
- Anatomy of the small business
- More prospects, fewer suspects
- Niche plays
- Behavioral economics
- Fee and price strategy
- Repackaging or re-bundling
- Adding value to your products and services
- Asking for the business
- Reducing risk for the client
- Creating urgency
- Business client databases
- Marketing ideas

Who should attend?

Anyone in a sales role in a financial institution environment including Branch Managers, Consumer Lenders, Mortgage Lenders, Relationship Advisors, Regional Managers, Vice Presidents, Sr. VP's, EVP's of marketing, lending, retail, and branch administration.

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June 15 - Etiquette for Financial Associates

Program Overview

Just the word 'etiquette' sounds so stodgy, and out of place in today's digital world. Social media has made us confused as to what is appropriate behavior, what is individualistic vs. boorish, and what in the world are we supposed to act like?

Etiquette is essential, especially in a business that is truly based on relationships, like a financial institution. This engaging webinar addresses the specific skills financial professionals should know when placed in a business situation. This is the stuff business schools don't tell you.

Agenda:

- Introductions and conversations
- Dining
- Which silverware?
- Proper meeting etiquette
- Electronic etiquette
- Around the office
- Stuff everyone should know!
- And more ideas

Who should attend?

Anyone who attends meetings, meets with customers and prospects, HR executives, managers, and coordinators, Training professionals, and anyone else concerned with how your financial associates are representing your financial institution.

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June 22 - Rainmaker Sales Calls

Program Overview

Is your company closing the deals it should be closing? Are your financial associates getting the margins you should? What are your associates negotiating? Clients and prospects are 12 times more likely to buy from you if you connect with them. This thought provoking and entertaining presentation shares the latest proven tactics and strategies to ensure that your sales team drives the most revenue possible from their selling efforts by focusing on what the client or prospect really wants and needs, not what we need to sell them.

Agenda

- How clients and prospects get bogged down and strategies to get them moving toward a close
- Categorizing leads and close rates
- How to recycle lost leads, and lose the non-productive ones
- How to maximize selling time for loan officers, business development officers, branch managers and other calling officers
- Free research tools to generate prospects and sales
- Generating more referrals through sales calls
- Selling at higher margins
- Adding value
- Professional closing
- The key link between questions and sales

Who should attend?

Any financial institutions sales professional including lenders, business development officers, mortgage originators, branch managers, new accounts salespeople, and managers of these professionals looking to develop new strategies and tactics to improve sales performance.

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June 29 - Getting More Out of the Branch Experience

Program Overview

Growing your financial institution by converting more visits into sales, is more than just a sales number. To increase conversions and sales, you have to provide a consistent and unique experience for the client and the prospective client. The client is multi-connected to your financial institution, more informed, and more demanding. Our clients like us, are satisfied with us, and even might recommend us.

This engaging webinar will illustrate inexpensive ideas to get the affection of our clients, regain their trust, and benefit from their loyalty. We will discuss what will deliver the experience and value such as personalization, branch transformation, technology, and service that will allow you to differentiate your company in today's crowded market. The ultimate goal is to delight the client by providing a great experience that provides expert advice and assistance, creates a strong sense of community, and an easy-to-understand and streamlined process.

Agenda

- Adjusting the financial institution culture
- Personalization
- Building client confidence
- Client feedback
- The importance of touchpoints
- The branches
- While they wait
- With your associates
- Embrace technology and self service
- Lessons from the hospitality industry
- Universal employees
- Technology and change
- Loyalty and retention metrics
- Showcase new apps and products
- Using convenience to sell
- Making clients delighted

Who should attend?

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