

Bank Sales Management: Coaching From 3 x 5 Cards

Video Script



Four things every bank sales manager needs to improve coaching quickly and accelerate sales results.

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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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Hey, welcome back, Nick Miller, Clarity Advantage. This time we are going to talk about coaching in an episode called 3 x 5 cards.

Coaching is all the rage at this point, and why not. Senior leaders tell us, "Our branch managers, our business bankers, our small business bankers are not meeting our clients' trusted advisor expectations. And that's because we're not training or coaching enough." So let's talk about coaching for a few minutes.

What I'm going to share with you I got from coach Mario when I was learning to coach little kids in playing soccer. And coach Mario at a coaching session said, "You want to look like a genius with your kids? Write out your practice plan ahead of time on a 3 x 5 card and you keep it in your back pocket, see?" and he pulled it out of his back pocket. And he said, "When your kids come to practice, they want to GO, and they will think you are a genius because you keep things rolling and they don't see you do it. So, that's coach Mario, the 3 x 5 card.

So what application does that have in the banking industry?

If we're going to coach people to higher levels of performance,

The first thing we need is a playbook.

How we are going to do business, what's the recommended approach. That's the playbook. The system we're teaching.

Second thing is a document – what good looks like – how well to do the playbook activities.

What good performance looks like, just like we would have for soccer skills. Playbook says what to do, what good looks like says how and how well to do it. The quality criteria.

The third thing is the 3 x 5 card, your practice plan, and we need one of those for each individual we are coaching.

And on that 3 x 5 card, we write down one or two or three things that we're going to work on with that person. When we're with somebody we can pull out the card and say, aha, this is the thing I'm trying to develop with this person and this is how I'm going to do it. Our practice plan.

Then, we observe, we demonstrate the skill, we work with them to get better at the skills on the card.

When they hit what good looks like on one of the three items, we cross it out

and write in a new one.

So, to improve coaching very quickly, here's what we need:

A playbook – here's how we do business. The system we're teaching.

What good looks like – the quality criteria that go with the playbook.

3 x 5 cards – each individual, write down what we're working on with them.

Then get out in the field – observe, demonstrate, boost their performance.

Coach, coach, coach.