How to Design Training that Adds Value to Business Relationships

*The strategies described in the article correspond with the fourth rating scale on our **Small Business Readiness Checklist for Training—Design Training That Adds Value to Business Relationships**. Use the checklist side-by-side with the article to assess opportunities to boost training's impact on small business results.*

Once branch staff have been trained on the business challenges and the bank's solutions, **conversation training** should follow.

Well-designed conversation training ensures branch staff can engage small business owners—draw out their goals, their challenges, and their preferences so that bankers can recommend the right products at the right time.

The biggest challenge is specificity—developing conversation models general enough and simple enough for branch staff and small business bankers to manage yet specific enough to bring value to the businesses your bank is targeting.

Three keys to designing training that will help your bankers engage small business owners in conversations that add value:

1. Focus	Developing one general conversation model and designing supplements for the specific businesses and challenges the bank is targeting (e.g. providing one list of supplemental questions for a medical practice manager and another for engineering firm office managers).
2. Practice	Providing branch staff with ample practice opportunities to use the conversation models in real business conversations. Invite business owners to come to the training or be available by phone. Use simulations for life-like practice opportunities.
3. Experiences	Equipping staff with insights from the bank's experience with other companies (i.e. best practices) which they can draw into conversations.

Clarity's experience shows that when branch staff engage business owners in discussions around the challenges they face and the options they have available to address the challenges across the full-range of their cash cycles and other aspects of the business, there are two key benefits: (1) the owner has a feeling that the banker is genuinely interested in the business and (2) the banker gets to propose a suite of potential supports that have a clear connection to the owner's goals and challenges.