

# Accelerating Sales Skills

## Overview



Business-focused sales team members develop broader, deeper relationships faster by focusing on client goals, values, and priorities.

### PROGRAM PURPOSES:

- To identify more opportunities and develop broader, deeper relationships with existing clients, faster
- To improve preparation, discovery, presentation, and follow-up skills in conversations with clients and prospects

**Accelerating Sales Skills** is Clarity's most advanced level sales program, designed for your high-level branch managers and business bankers. The program can also be tailored for various business lines and varying participant skill levels. Participants increase the productivity of their sales calls by:

- Focusing and preparing for sales conversations
- Facilitating more extensive, deeper discovery discussions
- Helping business owners clarify their priorities for action and motivations for changing or adding to their current bank products
- Presenting recommendations and reaching agreement
- Following up with the client and the internal team

## Learning Activities – Pre-Work, Classroom, Field Sales Meetings

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.

Clarity Advantage Corporation  
28B Junction Square Drive  
P.O. Box 1429  
Concord, MA 01742-1429  
978-369-4755  
[www.clarityadvantage.com](http://www.clarityadvantage.com)

### PRE-WORKSHOP PREPARATION

Participants complete pre-work including:

- Discussion with their managers about the course (and optional observation of banker by manager prior to attending)
- An introduction to the bank's value positioning and the concept of a personal value positioning
- A brief review of available industry research tools

### CLASSROOM TRAINING

During the two-day classroom experience, participants complete a series of small group learning activities, extensive role play, and discussions including:

- Reviewing the sales process, annual review cycle, and sales call structure
- Researching, planning, and preparing for calls
- Facilitating discovery conversations around six areas (includes multiple practice or role play opportunities): cash flow, financing growth and acquisitions, reducing risk, reducing expenses, accumulating wealth, and managing your personal finances

## CLASSROOM TRAINING [continued]

- Preparing for and leading presentation discussions to share ideas
- Following up after the call

(Optional) video recording of participant role-play sales calls to be used for coaching after the workshop.

## POST-TRAINING SUPPORT AND TOOLS

The Clarity facilitator provides coaching, accountability, and reinforcement as participants share their experiences with the Clarity tools. Clarity provides one-hour small group conference call clinics for bankers and managers at two weeks, four weeks, and six weeks following the classroom training. This process sustains and accelerates the learning and adoption of the new skills and provides a model for sales managers to implement with their teams.

Support tools include:

- “Quality” criteria for sales skills (“What Good Looks Like”)
- Call Planning Worksheets
- Business Priorities tool
- Cash Flow Conversation tool
- Call Observation Worksheets for coaches
- Review and Action Planning Worksheets for coaches

Optional:

- Follow-up days for video-taped role plays, remote role plays, and remote role plays of sales calls and manager coaching

## Variations

Clarity works with many banks that have extensive sales processes in place as well as bankers who have varying degrees of selling skills. Often, requests are received for minor, targeted adjustments to complement a particular set of sales skills. Clarity offers one-day workshops designed to focus specifically on:

- **Pre-Call Planning:** An effective pre-call planning process is introduced that includes agenda setting and transitioning to the “business” portion of the meeting. Discussion and exercises can be customized to reflect the sources of available industry and prospect information for a particular bank.
- **Setting Priorities:** A conversational approach to help bankers 1) guide business owners through a discussion about their business challenges; 2) assign levels of urgency to the identified challenges; and 3) to assist business owners in prioritizing their focus on the identified challenges.
- **Presenting Individual and Bank Value Positioning:** Many banks have corporate value propositions that begin to vary widely as associates are asked to articulate corporate propositions. In addition, it is uncommon for bankers to create and own an individual value proposition. This workshop helps bankers polish the presentation and interpretation of their corporate value proposition in addition to creating and practicing an individual value proposition.
- **Presenting Ideas and Solutions:** Many selling situations with business owners culminate in multiple opportunities for bankers. This workshop presents a sequential approach to help bankers summarize conversations and to position next steps in the sales process. Where multiple opportunities exist, the most immediate sales are focused upon and closed while at the same time, following a model to help the prospect understand how to prioritize additional future next steps.