

Big Picture Conversations

Overview



Banking success is largely determined by the ability to build a meaningful connection with prospects and customers. At the root of any productive relationship is a base of understanding about the activities and relationships in a customer's environment and cash cycle.

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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PROGRAM PURPOSES:

Confidence and Capability in Business Owner Conversations

One of the keys to conversation with business owners is to see the “big picture” of the business from the owners’ perspective – the economic and physical context in which the owner runs the business; the external influences that affect owner decisions and business health; the relationships between the company and its suppliers, customers, employees, owners, and regulators; and the critical elements of its cash cycle.

Normally, developing this perspective takes years of experience talking to business owners, synthesizing learning developed through many conversations.

Clarity’s **Big Picture Conversations** program will significantly shorten that process, helping program participants develop conversational confidence based on:

- A visual frame of reference for business operations.
- An organized flow of questions and conversation that draw out important information about businesses and owners – visions, goals, people, products, and payment cycles.
- Increased ability to connect business owners’ operations and challenges to bank products and services that can address them.

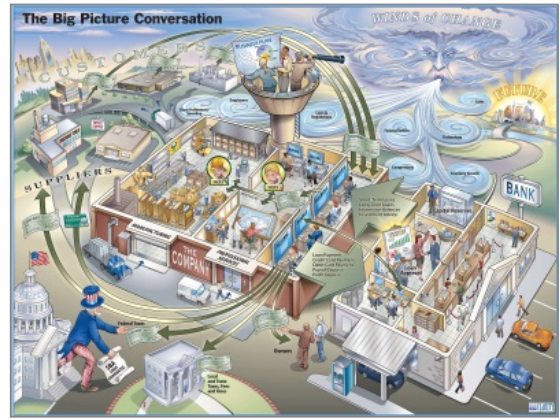
Learning Activities – Classroom

Participants work in small table groups through a series of activities built around a large table mat - a visual representation of a business.

Program segments include:

- **What Do You See?** Participants describe the internal and external relationships and processes in the company.
- **What Could We Ask?** Working backwards from their “What Do You See” observations, participants develop questions that would draw out the information they can see on the mat.

- **Challenges and Solutions.** Participants refocus on the mat to identify the bank products and services that the business and its owners and employees use now.... and what additional products they *could* use to improve their financial situations. With those possibilities identified, participants work together to generate more specific questions that would help them understand the potential value of bank products to the business.
- **At My Desk.** Participants (with support from a conversation guide) synthesize their learning in role-play conversations as if... they were speaking to the business owner at their desks in the bank or as if... they were speaking to the owner on-site, at the business.



Variations

This half-day workshop can be extended to include more detailed learning activities focused on:

- Specific target business types
- High-priority bank products or services
- Additional conversation practice

Implementation

The workshop can be led successfully with brief leader orientation in the context of:

- Planned classroom training
- Team or regional sales meetings
- Large-scale meetings