

Wowing the Customer Through Business Development & Service



Participant Key Skill Transfers to Take Away:

1. Learning how to ask great customer questions.
2. Working with customers to identify goals and dreams.
3. Selling appropriate products to actualize customer dreams and goals.



On-Demand Recorded Session

Course Introduction

In this entertaining seminar, we explore the needs, wants and expectations of:

- New customers
- Digital customers
- Younger customers
- Small business customers

We also discuss how to identify referral opportunities to help drive results across all areas of the bank.

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Key Topics

- Expectations from top customers, whether they visit us at the branch or not
- Growing the customer relationship – Onboarding and all-boarding
- Dream building insights – Dreams you are finding through customer encounters
- Establishing baseline service standards – Hear the dream; pick the product
- Great cross-selling – Asking great questions to get the customer talking to discover dreams
- Streamlining your work processes – Red carpet exercise
- iGen and millennial customers – Trouble and opportunity ahead, must be able to manage relationships up and down with co-workers, and with client relationships
- Growing the branch – The bored board concept
- Referral form and procedures to get the client to the right employee for help
- Action plan for skills transfer back to the job

About the Presenter

Duane Sobecki is senior partner of Focused Results, a sales and marketing strategy, consulting, and training firm concentrating on results-driven process consulting and training experience in community banks and other financial institutions. Sobecki is a renowned authority in sales strategy and strategic market segmentation. He provides assertive strategies to drive loan demand, business development, and product and service lines to community banks.

Sobecki specializes in helping the financial services industry better segment important markets, and direct sales and marketing strategies at those key segments to ensure revenue and profit growth. He holds a BS from the Kelley School of Business at Indiana University, Bloomington, and has a certificate in management planning from the University of Illinois - Chicago.

Registration Fees

Cancellation Policy

All cancellations must be made in writing prior to the seminar day. Invoices and training materials will be sent to all “no shows.”

CBAI MEMBER

On-Demand Recorded Session \$500 per bank

****PROSPECTIVE-MEMBER**

On-Demand Recorded Session \$1,000 per bank

**Only financial institutions/firms eligible for CBAI membership.

Registration Form

Wowing the Customer Through Business Development & Service
On-Demand Recorded Session

Please Print

Name of Bank _____

Address _____

City, State, Zip _____

Tel. No. _____

Name/Title _____

E-Mail _____

Name/Title _____

E-Mail _____

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Agenda

This session runs for approximately six hours in length. Participants have access to the presenters email so questions can be asked.

CBAI is a registered Public Accounting Continuing Professional Education (CPE) provider by the Illinois Dept. of Financial and Professional Regulation.

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Tracy McQuinn, Sr. Vice President
Melinda McClelland,
Vice President

Jennifer Nika, Vice President
Kim Cordier & Tina Wilder,
Administrative Assistants
Department of Education
& Special Events

800/736-2224 217/529-2265

Fax: 217/585-8738

Terry Griffin,
Vice President
Chicago Area
773/209-2260

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