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CLIENT ACQUISITION SPECIALISTS

CLIENT ACQUISITION IN BANKING SERIES™

THE VALUE CREATION SELLING WORKSHOP™

Business Challenge

With the advent of mobile technology, dwindling reliance on cash and advances from the Fin-Techs, banks have never competed harder for the corporate and retail client. Clients are armed to the gills with rich data on the impact of your solution and compliance demands are driving floods of well-scoped RFPs for even the most revered banking institutions. As a result, bankers need to take more of a solution approach to client value - tying their capability the "pebble in their client's shoe."

The Focus

The Value Creation Workshop™ provides bankers with tools, strategies and messaging to leverage their entire organization in creating client value. Participants will learn a different brand of preparation that uncovers the self-interests and motivations of a broader set of stakeholders while creating crisp messaging that stimulates genuine curiosity. Contact and conversation management strategies are provided against the backdrop of a relevant and custom-tailored case study and exercises. Participants work against their own clients throughout the learning experience.

Key Content

- Learning to avoid a commodity trap for your products and solutions
- Crafting hypotheses of value for target accounts and relevant stakeholders
- Uncovering reliable paths of influence and support with Organization Decision Maps
- Creating insight-driven messaging for an influential set of internal stakeholders
- Stimulating dialogue and fostering the "second" meeting
- Managing clients ongoing to grow the relationship and avoid RFPs

Outcomes

By participating in **The Value Creation Workshop™** participants will learn to:

- Map an organization and prepare ideas on how they can help, even before making contact
- Leverage research and preparation to inform messaging and secure high-value meetings
- Create the right conversations that validate clients and informs where you both can drive value
- Test solutions with your team and with clients to assess fit
- Employ strategies that actually enhance and grow the relationship and shorten the sales cycle
- Involve their own organization in high-value pursuits and overall relationship building

WHO WILL BENEFIT

The Value Creation Workshop™ is designed for seasoned lenders who need to add value to clients – value that transcends their product or service.

DELIVERY

Delivered as a 2-day workshop with 90 days of situation-based reinforcement.

ABOUT

Bill Walton Sales Training (BWST) is a sales training and coaching firm dedicated to supporting client-facing professionals in Financial Services. The firm works with Private Client Executives, Bankers and Insurance salespeople to help them "mean more" to their clients. BWST's suite of training programs, tools, and post program coaching helps these organizations achieve results their clients can measure. Based in Princeton NJ, BWST works with Asset Managers, Banks and Insurance Brokerages that see value in maximizing the client interaction.

BILL WALTON SALES TRAINING™

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CLIENT ACQUISITION SPECIALISTS

CLIENT ACQUISITION IN BANKING SERIES™

A GIVING HAND IS ALWAYS FULL™: A ROADMAP TO LASTING COI RELATIONSHIPS

Business Challenge

Centers of Influence want what you want – *more business*. But what COIs want from bankers and their partners can be something entirely different. Credible networking sources are looking to make a valuable impact on their contacts by providing a trusted resource. And that is you. This program addresses the common categories of COIs, their sources of value, and specific relationship building tactics bankers can adopt to attract them.

The Focus

Participants are given a window into their most common centers of influence - what they covet, where they struggle, and where they need the support of a partner. **A Giving Hand is Always Full**™ helps financial professionals expand their idea of who can be a center of influence and offers pathways for connecting with them. This program provides the strategy, messaging and meeting management tips to move COIs from mere "acquaintance" to a strategic partner.

Key Content

- Adopting a COI mindset – **A Giving Hand is Always Full**™
- Sleuthing skills to qualify the right COI
- Thinking beyond CPAs and Attorneys
- Contact management strategies
- COIs and sources of value
- Seeing the client through the lens of the COI
- Referrals vs. Introductions – knowing what you're asking for
- Keeping balance in the relationship
- Communicating your value prop to COIs

Outcomes

By participating in **A Giving Hand is Always Full**™ participants will be able to:

- Assess fit and balance in a COI relationship
- Adopt proven tools for COI outreach
- Shape messaging that helps COIs understand your value
- Grow referral sources beyond CPAs and Attorneys
- Manage initial COI interactions to mutual benefit
- Leverage tools and tactics to help your COIs grow
- Balance the relationship to an equitable give and take

WHO WILL BENEFIT

A Giving Hand is Always Full ™ is designed for bankers that need to drive more business via introduction and referral. Perfect for bankers that have exhausted most traditional list management strategies and have something to offer those that can refer.

DELIVERY

A Giving Hand is Always Full ™ is delivered in two-hour and half-day formats.

ABOUT

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BILL WALTON SALES TRAINING™

CLIENT ACQUISITION SPECIALISTS

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TEAM SELLING FOR BANKERS™

Business Case

The business of banking and service delivery has gotten more competitive. Local market competition combined with a plethora of mobile solutions has forced bankers to link their capability to the business issues of the day. Thus selling teams in banking require a host of skills – skills that one banker alone cannot satisfy. More complex sales pursuits have bankers needing to connect internal subject matter experts to compete for larger opportunities. The banks that are orchestrating teams of credible and curious stakeholders that match up well with clients are winning their share of business.

The Focus

BWSTs Team Selling for Bankers teaches participants how to utilize their organizations' resources to build the right team for presentations and complex sales pursuits. Our program helps bankers assemble key internal and external stakeholders to execute coordinated and compelling presentations that add value for prospects and win business. Team presentation and conversation management strategies are provided against the backdrop of a relevant and custom-tailored case study and exercises. Participants work in teams to role play key behaviors against real client scenarios.

Key Content

- The team selling mandate
- Team leader vs. team member
- Mastering your introduction and those on your team
- Selecting complementary vs. combative personalities and building team member rapport
- Bringing insights as well as capability to diverse buying teams

Outcomes

By participating in **Team Selling for Bankers™** participants will learn to:

- Map a buying team and determine the best connections for the selling team
- Understand the role of team leader, and being a member of a supporting cast
- Maximize a prospect's agenda to the advantage of the team
- Manage presentation introductions, handoffs and personal messaging with ease
- Conduct ideation sessions for pursuits the maximize the input of the team
- Plan, practice and make adjustments together.
- Execute as a unit, debrief together to advance the sale, and replicate what worked for future pursuits

WHO WILL BENEFIT

Team Selling for Bankers™ is designed for seasoned Lenders and those that support them in large client pursuits. Perfect for those new to the sales process and those with limited client interaction experience.

DELIVERY

Delivered as a 1-day workshop with pre-work, custom case study and 90 days of situation-based reinforcement.

ABOUT

Bill Walton Sales Training (BWST) is a sales training and coaching firm dedicated to supporting client-facing professionals in Financial Services. The firm works with Private Client Executives, Bankers and Insurance salespeople to help them "mean more" to their clients. BWST's suite of training programs, tools, and post program coaching helps these organizations achieve results their clients can measure. Based in Princeton NJ, BWST works with Asset Managers, Banks and Insurance Brokerages that see value in maximizing the client interaction.

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CLIENT ACQUISITION SPECIALISTS

CLIENT ACQUISITION IN BANKING SERIES™

TAKING THE STRESS OUT OF ASKING FOR THE BUSINESS™

Business Challenge

Closing effectiveness among bankers is declining. Bill Walton Sales Training's recent survey of area managers revealed that in 80% of prospect interactions, their bankers were not requesting commitment. The demands of existing client pressures, administration, and new regulatory changes have made prospecting more of a get-to-it-when-I-can activity vs. a daily discipline. The result – a tactical, transactional approach to prospecting that is turning prospects off.

The Focus

Participants are provided an interaction model that outlines valuable prospect-focused activity from prospecting to close. A last call/next call rolling engagement model helps bankers know what do and when while building momentum for an "ask". Financial Professionals will learn to present solutions with context – using the actual spoken words of prospects to ask for the business. The program provides sample scripts and statements of beneficial value that bankers can apply immediately to secure commitment.

Key Content

- An industry-accepted sales process and engagement model
- Getting over the trust barrier with prospects
- What to expect from three types of prospect meetings
- Discovery questions that shape any type of "ask"
- Mastering the art of "playback"
- Summarize and Suggest framework for asking for the business

Outcomes

By participating in **Taking the Stress out of Asking for the Business**™ participants will be able to:

- Create a commitment objective for every meeting they take
- Use prospects' spoken words to shape a close
- Understand the psyche of the prospect as you advance through the sales process
- Adopt a rolling engagement model that demonstrates the value of the next meeting
- Clearly articulate the value of moving forward by asking for specific prospect commitment.

WHO WILL BENEFIT

Taking the Stress out of Asking for the Business™ is designed for Financial Professionals have earned the right to ask for specific commitment from prospects. Perfect for bankers that experience high levels of procrastination and delay in their prospecting efforts.

DELIVERY

Taking the Stress out of Asking for the Business™ is delivered in two-hour and half-day formats.

ABOUT

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TELLING YOUR STORY: VALUE PROP MIXOLOGY

Business Challenge

Prospects respond to how a banker describes situations they can personally relate to. Helping prospects see themselves in the relationship engenders trust and staves off procrastination. *So why aren't banker value props better*? Too many bankers fail to state why their clients work with them, and why specifically the prospect would be interested. Any prospect worth attracting is likely with another banker – the reason for change must be compelling.

The Focus

Prospects want to hear a banker's credibility and issue fluency – this workshop helps bankers communicate that through three levels of messaging: a 12-word tagline, a 45-second elevator pitch and a 2-minute value proposition that answers the "*why should I work with you?*" question.

Key Content

- Profiling your ideal client: Client type/Problem/Solution profiling model
- Knowing the dimensions on which you compete
- Articulating your impact, knowledge and "issue fluency"
- Tagline development
- Elevator Pitch Creation
- Four-part Value Proposition composition

Outcomes

By participating in **Telling Your Story: Value Prop Mixology**™ participants will be able to:

- Speak to why other clients chose to work with them
- Articulate a client type focus without the limitations of "niche" targeting
- Decide on the most relevant "value" factors that matter most to ideal prospects and clients.
- Craft three levels of messaging to support their prospecting: a tagline, an elevator pitch and a four-part value proposition.
- Establish common ground by putting their messaging into context for multiple stakeholders, including COIs and other referral sources.

WHO WILL BENEFIT

Telling Your Story: Value Prop Mixology™ is designed for bankers and the colleagues that support them that need to tell a differentiated story in order to attract high-value prospects.

DELIVERY

Telling Your Story: Value Prop Mixology™ is delivered in two-hour and half-day formats. A perfect program for teams in the Corporate Lending and Mid Market banking space.

ABOUT

Bill Walton Sales Training (BWST) is a sales training and coaching firm dedicated to supporting client-facing professionals in Financial Services. The firm works with Private Client Executives, Bankers and Insurance salespeople to help them "mean more" to their clients. BWST's suite of training programs, tools, and post program coaching helps these organizations achieve results their clients can measure. Based in Princeton NJ, BWST works with Asset Managers, Banks and Insurance Brokerages that see value in maximizing the client interaction.