

# Common Sense Solutions

Teresa Allen



## BANK TRAINING PROGRAMS

### CUSTOMER SERVICE:

#### Customer Conflict: Opportunity Knocks!

*Customer Conflict can signal the end of your relationship with a customer or the beginning of an even stronger relationship! In this highly interactive program using music and role plays, Teresa shows participants how to:*

- ♦ Differentiate between Institutional and Transactional Complaints
- ♦ Respond to Varied Levels of Customer Anger
- ♦ Handle Complaints Originating from Customer Error, Policies, and Regulations
- ♦ Avoid Conflict by Catering to Varied Customer Personalities

#### Making Lasting First Impressions

*First impressions are the life blood of the bank. This entertaining and informative seminar opens with a skit titled "Once IS Enough" starring your staff! Participants will learn how to:*

- ♦ Make Customers Feel Welcome
- ♦ Project a Positive Attitude
- ♦ Avoid Bank Lingo
- ♦ Establish Rapport
- ♦ Recognize Sales Opportunities
- ♦ Provide Lagniappe Service

#### Bank Telephone Skills

*Telephone contact with bank customers is on the rise. Participants will learn valuable telephone skills:*

- ♦ Effective Greetings
- ♦ Listening Skills
- ♦ Speaking Clearly and Concisely
- ♦ Handling Telephone Conflict
- ♦ Questioning Skills
- ♦ Recognize Sales Opportunities

### SALES:

#### Branch Manager Sales Workshop: 12 Sales Mini-Sessions for Your Branch!

*This workshop will allow managers to launch an on-going sales training program within their office. The positive result will be a continuous strong sales effort at the branch, directed and continually monitored by a manager who now has the skills and tools necessary to coach his or her team to higher sales performance levels. Program includes a 50 page trainer's manual for the manager, complete with reproducible handouts to take back to the branch!*

- ♦ Being Prepared to Sell
- ♦ Knowing Your Competition
- ♦ The Person Behind the Sale
- ♦ Asking Questions
- ♦ Sales Opportunities/Needs Features/Benefits
- ♦ Handling Objections
- ♦ Closing Techniques
- ♦ Product Presentations
- ♦ Selling to Seniors
- ♦ Selling Credit Cards & CDs
- ♦ Cross Selling
- ♦ Cross Selling From the Loan Portfolio

Program also includes suggestions for keeping the sales culture alive through exercises such as shopping competitors

#### The Art of Asking Questions: Your Key to Bank Selling

*Build the sales skills of your bank through this highly interactive workshop where platform sales Personnel practice the skills they are learning through numerous exercises and role plays. Part I includes First 7 Segments listed above Part II includes last 5 segments*

#### Selling From the Loan Portfolio

*Cross sell training in the bank often focuses only on the deposit side. In this unique seminar, your lending personnel will discover the wealth of cross sell opportunities in the loan portfolio documents:*

- ♦ Personal Financial Statement, Credit Application, Credit Bureau Report

Please contact us for a list of keynotes and breakout programs perfect for your banking conference or meeting!



About Your Presenter . . .

**TERESA ALLEN**

Common Sense Solutions

### **Teresa Understands Banks!**

Why hire someone who gives the same presentation to your bank as they give to the corporation down the road? Bank sales and service staff face special challenges and opportunities!

Formerly an Account Executive and National Trainer for Clarke American, Teresa called on 8 to 10 banks and credit unions a day for three years, covering a 14,000 square mile territory. **Teresa now shares her bank and credit union experiences and observations with your staff; large credit unions, small credit unions, regional and national bank competitors, community bank competitors, large bank & credit union competitors, small community bank and credit union competitors; successful sales and service institutions as well as banks and credit unions with very weak sales and service efforts.**

Teresa has molded her sales and bank training programs around her observations of what worked and what didn't work in the real world. Bank staff members across the country express their appreciation for Teresa's understanding of their day-to-day environment!

Teresa also offers consulting services to your bank. She frequently arrives the day before your program to visit your branches. She is then able to discuss her observations of your sales and service efforts with management and emphasize areas of greatest need in the training program the following day.

### **Comments on Bank Training Programs:**

Teresa's programs have brought a new level of service to our customers. In a highly competitive market this is critically important.

Thank you for a job well done! I know that our CSRs received some much needed motivation from someone "who's been there". You related so well with them and I think that is why we will see a great deal of success on the heels of the training!

Thank you for another excellent seminar series. As usual, your presentation was extremely impressive and it offered information and techniques that our employees can put into place immediately. Teresa, you have an uncanny ability to motivate people. Your excitement and enthusiasm is contagious and my staff warms up to you immediately. That motivation combined with useful information and insights you provide has helped us reach a new level of customer service and salesmanship.

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