

SMALL BUSINESS BANKING SALES SKILLS

Calling on Small Business Customers

Helps participants prepare and execute the perfect sales call. Covers the different call purposes, including Introductory, Profiling, Presentation, and Follow-up. Helps participants plan a sale and relationship-building strategy for conducting face-to-face calls built on an understanding of business types, life stages, and their own local market.

Audience:

Bank personnel responsible for face-to-face small business customer calls.

Credits available: AIB

Relationship Selling to Small Business Customers

Teaches participants how to apply foundational sales skills when selling banking products to small business owners. Using your skills effectively will help the customer see that, in the long run, he or she will save money, increase revenues, and run a business more smoothly. You are making a commitment to your customer to find the best way to solve his or her problem.

Audience:

Bank personnel who are new to the small business market and who are responsible for selling bank products and services to small business customers. It is suggested that participants take Fundamentals of Small Business Banking before taking this course.

Credits available: AIB, ICB

Servicing and Growing Small Business Relationships

Provides participants with techniques to extend the small business relationship beyond the initial sale. Covers the different legal structures of small businesses; types of small businesses and their needs and expectations; the different types of information used to monitor a relationship with a small business including financial information, client records, and other resources; and the value of site visits for uncovering additional information.

Audience:

Bank personnel responsible for managing and growing a portfolio of small business customers.

Credits available: AIB