

“Bob clearly loves what he does and has displayed his passion for the topics. He worked hard to ensure the big concepts were grasped. This was the most enjoyable training I have attended.”

# How To Create & Maintain A Sales Culture In A Community Bank

**SEPT 19-20, 2017**

## LOCATION

**CAMBRIA hotel & suites  
5045 East Park Blvd.  
Madison**

## THIS SEMINAR ANSWERS TOUGH QUESTIONS

- What essential components of a bank’s sales structure must be in place in order to establish an effective long-term sales environment within the bank?
- What core topics must be included in the sales training of all bank personnel?
- What core sales skills must be in place for any sales person (i.e., all employees)?
- We have some employees who have very negative perceptions of sales and salespeople. How can we change those negative attitudes towards sales?
- What are the three core concepts regarding the use of incentives in the bank environment?
- How do we motivate all employees to be involved in sales to the best of their abilities?

## WHO SHOULD ATTEND

If, in your bank, you are attempting to set up a sales environment for the first time or to restructure one that is not functioning to your expectations, the following should attend: **The CEO and one or more management personnel**

If you are satisfied with the structure of your sales environment, but want to improve: employee attitudes toward sales, employee sales skills, employee teamwork, sales training techniques, and others as identified in the brochure, the following should attend: **Any employee that will benefit from the topics covered (including the CEO).**

## SCHEDULE

<b>8:30am</b>	<b>Registration &amp; Continental Breakfast</b>
<b>9:00am</b>	<b>Seminar Program Begins</b>
<b>12:00pm</b>	<b>Lunch</b>
<b>1:00pm-4:30pm</b>	<b>Adjournment</b>

## MEET YOUR SEMINAR LEADER

**ROBERT N.  
ERICKSON**



President of Bank Training, Waukon, Iowa, offers a complementary background in banking, sales, public accounting, insurance, and bank training and consulting. His experience includes more than 14 years as a banker and over 27 years as a banking consultant and principal of Bank Training. A seasoned seminar and convention presenter, he specializes in designing and maintaining customized bank selling environments. Bank Training is the select training and consulting company utilized by numerous state banking associations and banks nationwide.

## HOTEL ACCOMMODATIONS

Attendees who need lodging can contact the Cambria hotel & suites directly at 608-241-7070, and ask for the “Center for Financial Training North Central States” room block of **\$82.00 plus taxes per night**. The room block expires Tuesday, September 5, 2017. After this date, rooms are subject to availability and at prevailing rates.

# DAY 1 MAIN TOPICS

## DESIGNING YOUR BANK'S SALES STRUCTURE

- How to both organize and implement your sales culture
- Organization – Implementing Stage I, II & III
- Directing Sales – Who? and How?
- Key elements of managing both sales activities and personnel
- Specific duties of sales management
- Staff sales training
- Developing total staff participation
- Meshing sales and marketing functions
- Marketing Position as it relates to sales
- Product training – Efficient, Effective and Fun
- Duties of bank management
- Structuring your perpetual sales environment

- Attitude toward "Change".
- What is the meaning of "sales" to the community bank?
- Creating positive attitudes toward "sales".
- Why is sales development important to us as bankers?
- What makes a bank sales culture unique?
- Product knowledge as it relates to sales.
- Marketing and Sales – related but separate.
- Priority sales skills.

# DAY 2 MAIN TOPICS

- Priority sales skills (continued).
- Designing your bank's sales structure (see left).
- Incentives – core concepts.
- The importance of teamwork.
- Building teamwork among all employees and management.
- Strengths and challenges of teamwork.
- Continuing the process.

## TAKE NOTE

If you are attempting to make management level decisions regarding the initial set-up of a sales environment or improving and existing sales environment within your bank, then this seminar is a MUST.

One of the most frequent comments we receive from attendees of this seminar is "I wish my CEO was here." There is too much information for an attendee who participated in this seminar to come back to the bank and sum up the content.

The instructor has 27+ years in training and consulting bankers and teaches unique concepts for sales cultures. Structuring sales within a community bank can not be experimental. You need to get it right the first time.



# KEY PROGRAM TOPICS

“ Finally, a sales process that is true to the mission of community banking. This is not a sales training course; it’s a model for empowering your employees to better help your customers. Bob Erickson knows the value of community banking, its role in our communities, and how to teach sales practices to skeptical employees. Bob teaches how providing superior customer service can be the most important and profitable activity of your bank. ”

*Jerry Kuehl*

*Northwestern Bank*

## DESIGNING A BANK SALES ENVIRONMENT

### Participants Learn:

- How to structure an ongoing sales culture within your bank
- The key components of a bank sales environment
- What’s First? What are the components and what is their priority?

## ATTITUDE

### Participants Learn How To Develop:

- Positive employee attitudes toward selling and service
- Positive employee attitudes toward management’s selling initiatives
- Increased personal satisfaction derived from offering better and more professional service to their customers
- A positive change in overall employee morale
- Increased confidence in their abilities

## SKILLS

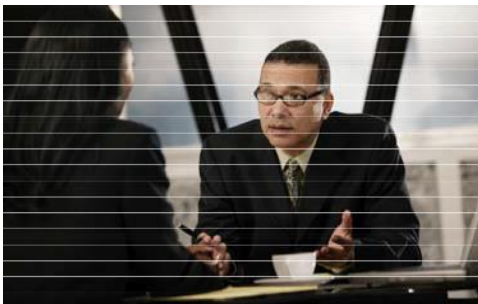
### Participants Learn:

- How to identify and be receptive to customer needs
- How to create links from customers’ needs to bank products and services
- How to develop top priority sales skills

## TEAMWORK

### Participants Learn:

- The importance of teamwork to the sales environment
- How to assess the bank’s teamwork
- How to develop teamwork within a “departmentalized bank”



Please direct questions to Sandy Kuehn at CFT by calling (414) 332-6468 or email at [sandy@cftncs.org](mailto:sandy@cftncs.org).

Registration will begin at 8:30 a.m. with a continental breakfast served. The program will run from 9:00 a.m. to 4:30 p.m., with lunch at noon.

QUESTIONS | SCHEDULE >



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SEPTEMBER 19-20, 2017

CAMBRIA hotel & suites | 5045 East Park Blvd. | Madison

## REGISTRATION FORM

<b>Name 1</b>	Title
Branch Address (if different from below)	Email
<b>Name 2</b>	Title
Branch Address (if different from below)	Email
<b>Name 3</b>	Title
Branch Address (if different from below)	Email
<b>Name 4</b>	Title
Branch Address (if different from below)	Email
<b>Name 5</b>	Title
Branch Address (if different from below)	Email
<b>Name 6</b>	Title
Branch Address (if different from below)	Email

## REGISTRATION FEE

Total Number of Registrants	<b>Registration Fee</b> <b>\$595</b>	Total Due to CFT <b>\$</b>
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## INSTITUTION INFORMATION

Institution			
Institution Address			
City	State	Zip	County
Business Phone			

**REFUND POLICY** | A refund (less a \$100 administrative fee) is provided for written cancellations received by CFT fifteen (15) or more business days before the start of each seminar. All requests for cancellations or substitute registrations must be provided in writing to CFT at [sandy@cftncs.org](mailto:sandy@cftncs.org).

Depending upon program prerequisite requirements, another student from the bank may be registered as a replacement for the original student without penalty. A registrant who has not paid prior to cancelling will still be responsible for the above described fees and charges and will be invoiced accordingly.

**It's Easy to Register! Simply fax or mail your completed form to:**

CFT-NCS  
5215 N. Ironwood Road, Suite 202  
Glendale, WI 53217 | **FAX** 414.332.6478

**REGISTRATION**

**\$595**  
per person

[WWW.CFTNCS.ORG](http://WWW.CFTNCS.ORG)