

Create & Coach Engaging Conversations in the Branch



On~Demand
Recorded Session

Course Introduction

With the flurry of deposit choices right now, many bank clients are shopping and hopping around, splitting their deposits among banks and fintechs. What if your bankers were better at relationship banking? Today's environment offers banks a great opportunity to drive increased engagement and relationships if you have the right people asking the right questions when your customers (or shoppers) come in the door, chat or call. Now more than ever, your bankers need a proactive process to initiate meaningful conversations. They must be skilled at asking important questions to take the focus off the rate and onto the client as a whole. Is your frontline staff ready?

Jack Kasel, sales development expert & community bank specialist with Anthony Cole Training Group, will introduce a new skill building, Retail Management Workshop, that is laser focused on helping you train your retail bankers to improve their relationship building skills. With the CARE program, leaders learn a 4-step sales training process including these components:

1. Confident Positioning
2. Assessing Needs
3. Recommending Solutions
4. Expanding Relationships

This program has been developed drawing from the book, *“Go-Givers Sell More”* and will be interactive with drill for skill and case study role plays. Leaders leave with the tools to take back and immediately utilize to impact your retail branch skills and productivity.

**Recommended pre-work for all participants.*

Tools:

- Workshop Deck – with notes
- 3 Videos for training staff
- CARE Placemat
- Follow up scheduled phone support with Jack



About the Presenter

Jack Kasel, with Anthony Cole Training Group, has 30+ years of experience in sales and sales management spanning a host of industries including software, transportation, printing services, insurance, and training. During his tenure at FedEx, he oversaw all aspects of regional training prior to being promoted to district manager. Since joining Anthony Cole Training in 2014, Kasel has become one of our community bank specialists, helping our bank clients sell better, coach better and hire better. He brings deep experience of feet on the street, practical selling as well as a coaching and training background, to help banks improve their sales results and close their sales opportunity gap.



KASEL



Registration Fees

CBAI MEMBER

On-Demand Recorded Session \$500 bank

****PROSPECTIVE MEMBER**

On-Demand Recorded Session \$1,000 bank

CDD members receive a 10% discount on live attendance only.

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

SEMINAR MATERIALS/ON-DEMAND RECORDED SESSION

The on-demand recorded session will be emailed to participants approximately 7-10 business days after the live event takes place. Your entire bank can utilize this session for training as it includes the video from the day of the program, plus the exact same handout materials as the live session. For more information, please contact Melinda at CBAI Headquarters.

CONTINUING EDUCATION CREDITS

If you have earned an ICBA Certification, CPE credit earned through your state banking association may be submitted for CPE purposes. Please note, approval is subject to review and must satisfy the respective certification requirements.

Registration Form

CREATE & COACH ENGAGING CONVERSATIONS IN THE BRANCH

On-Demand Recorded Session

Name of Bank _____

Address _____

City, State, Zip _____

Tel. No. _____

Name/Title _____

E-Mail _____

(E-Mail address required for registration).

Name/Title _____

E-Mail _____

(E-Mail address required for registration).

I have special needs, please contact me before the seminar.

Please select your payment method.

Check Enclosed Check in Mail

Pay at Door Credit Card*

**If you are paying by credit card, please fill out the following information.*

(Visa, MasterCard & Discover accepted).

Name as It Reads on Card _____

Company Name on Card _____

Billing Address of Card _____

Card Number _____ Exp. Date _____

Three Digit Security Code _____



Mail it in:
CBAI Education Department
901 Community Drive
Springfield, IL 62703-5184



Fax it in:
(217) 585-8738



Call it in:
(800) 736-2224



Click it in:
www.cbai.com

Date and Location

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Continuing Education

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

For More Information

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