

Outside Calling/Virtual Selling School for Calling Officers

Program Overview:

Sales calls and sales deals made with a hearty handshake may be a thing of the past. What in-person calling did represent was developing meaningful relationships with customers and prospects, after a series of meetings. That's where in-person selling and virtual selling are the same.

The "now economy" and technology are allowing calling officers to close deals through online meetings, video conferences, digital documents, e-signatures, and in-person meetings. Even large deals can be conducted at a distance. Prospecting and collections can also be managed using digital calling principles.

This fast-paced 3-hour Sales School will help the calling officer use the right combination of technology and sales tools to effectively and profitably sell banking products to companies and individuals, using both in-person and virtual approaches.

Who Should Attend

Anyone who has a business development or outside sales role in a community financial institution, including branch managers, commercial lenders, mortgage lenders, consumer lenders, business development officers, marketing officers, and VP's, EVP's and managers responsible for delivering sales results.

Agenda

- Setup and the Tools of the Trade
- Prospecting in a Digital World
- The Sales Call
- The Critical Importance of Sales Questions
- Moving the Sale Forward
- Effective Digital Closing Technique
- Handling the Signing
- Behavior-Based Approach to Collections
- Follow-Up

About Duane Sobecki, Your Facilitator



Co-Founder and CSO of Robovise, a digital wealth manager for banks and credit unions, and a Senior Partner of Focused Results, LLC Duane is a renowned authority in sales strategy and strategic market segmentation. Mr. Sobecki provides assertive strategies to drive deposits and money movement, loan demand, business development, product and service lines to community banks and other FI's.

Mr. Sobecki specializes in helping the financial services industry better segment important markets, and direct sales and marketing strategies at those key segments to ensure revenue and profit growth. Mr. Sobecki is the principal writer of Market Data Monthly, a weekly look at how banks can take advantage of the improving economy, and the author of numerous reports and booklets on key market segment development and improvement.

Mr. Sobecki holds BS from the Kelley School of Business at Indiana University and has a certificate in management planning from the University of Illinois - Chicago.