CENTER FOR FINANCIAL TRAINING[SM]

NORTH CENTRAL STATES

CBW Community Bankers of Wisconsin

Succeeding as a Personal Banker

2-Day Workshop:
Assess – Identify – Improve

Succeeding as a personal banker in today's retail environment means much more than just having technical expertise to answer questions and open accounts. It means learning to maximize your time with customers, finding ways to exceed their service expectations and fulfill their banking or investment needs. It also means understanding how this role contributes to your bank's success.

This 2-day workshop focuses on helping participants assess, identify and learn ways to improve their personal service and sales skills.

Agenda

- **Understanding Your Service & Sales Role – Using a Customer Focus**
  - ✓ Blending service with sales
  - ✓ Projecting a professional image & delivering exceptional service
  - ✓ Learning to follow customer cues – how customer needs and expectations vary
- **Choosing an Appropriate Sales Strategy**
  - ✓ Moving from order-taking to consultative selling – The Sales Continuum
  - ✓ Building rapport & credibility
  - ✓ Spotting opportunities – Asking better questions & creating dialogue
- **Effectively Presenting Products & Services**
  - ✓ Using "benefits" for added impact
  - ✓ Identifying cross-selling opportunities
  - ✓ Gaining customer commitment to a "next step"
- **Handling Difficult Customer Situations**
  - ✓ Turning problems into opportunities
  - ✓ Knowing how and when to say "no"
- **Partnering with Other Bank Employees**
  - ✓ Working with tellers to create referrals
  - ✓ Referring customer business to other areas within your bank

Speaker

Al Herrman, of Al Herrman Training & Management Consulting, is an accomplished trainer, coach and consultant with over 28 years of experience in training/education, and over 23 years experience in managing people and assisting others in developing more effective management/supervicory skills. He brings a practical, energetic, results-oriented approach to the design and delivery of his workshops.

Seminar Details:

Milwaukee
Tuesday, November 13, 2007 &
Wednesday, November 14, 2007

Country Inn & Suites
1250 S Moorland Road
Brookfield, WI

Sign-in: 8:30am (first day only)
Time: 9:00am – 4:00pm
Cost: $499 per participant
(CBW Members $449 per participant)

Registration Deadline: Nov. 1, 2007

Who Should Attend

Designed for anyone in retail banking who works in a customer-counseling role:

- personal bankers,
- customerer service/new account representatives,
- financial service representatives, and
- other equivalent positions.

Registration Information

Fax or mail this registration form, or register online, no later than two week prior to seminar date. Make checks payable to Center for Financial Training (CFT). Withdrawals made prior to the registration deadline will receive a full refund or a credit toward a future CFT seminar. Withdrawals made after the registration deadline an no-shows will not receive a refund or a credit. Substitutions may be made at anytime.

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Registration Form

Registration Deadline: *November 1, 2007*

Company Information

Company Name ☐ **CBW Member**	Contact Email
Company Street Address	City, State, Zip
Supervisor or CFT Rep Name	Supervisor or CFT Rep Signature / and Title /
Business Phone	Business Fax

Registrant Information

Name 1	Location: ☐ **Milwaukee**
Name2	Location: ☐ **Milwaukee**
Name 3	Location: ☐ **Milwaukee**
Name 4	Location: ☐ **Milwaukee**

Location (Please indicate total per location)	**Fees**
_______ **Milwaukee, WI / November 13 & 14, 2007** **Total Due to CFT:** $___________ *Checks payable to Center for Financial Training*	**$499.00 per registrant*** *CBW Members deduct $50 per registration • Fees include refreshments and materials **Registration:** 8:30am (first day only) **Seminar:** 9:00am-4:00pm

No refunds will be given after the registration deadline, however a substitute may attend. Deadline is two weeks prior to seminar date.
If you have any questions, please contact the CFT office at (414) 332-6468 or email info@cftncs.org.

Payment (Choose one)	
☐ **Bill Bank** ☐ **Check Enclosed** ☐ **Visa** ☐ **MasterCard**	Credit Card #
Name on Card	Cardholder Signature

Three easy ways to register: ***Fax, Mail or Register Online!***

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