

Keep It \$imple and \$uccessful (K.I.\$.\$.)

Branch Sales Training Program

Contents

Booklet 1 It Takes a Village: Getting It Right From the Start

About K.I.\$.\$.

How to use this booklet

Success depends on YOU!

Lessons from the Village

Moral of Story 1: There is lots of competition

Practice 1

Moral of Story 2: We must continually hunt

Practice 2

Moral of Story 3: We must use a team approach

Practice 3

Moral of Story 4: We need the right tools

Practice 4

Moral of Story 5: Both small and large prey feed the village

Practice 5

Are you ready? (Summary)

This booklet sets the stage for selling. It helps learners grasp the importance of:

- Continually selling
- Working as a team
- Every employee's individual responsibility to the success of the branch.

Booklet 2 Product Greetings, Customer Cues and the Formula for Success

About K.I.\$.\$.

How to use this booklet

Success depends on YOU!

Lesson 1: The business of financial services and the importance of your role

Practice 1

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Practice 2

Lesson 3: Delivering product greetings

Practice 3

Lesson 4: Building rapport and reading customer cues

Practice 4

Lesson 5: The K.I.\$.\$ formula for Success

Practice 5

Are you ready? (Summary)

This booklet covers three of the simplest, but most important steps in building customer relationships and increasing sales:

- Using product greetings with every customer, every time
- Building rapport by making conversation and reading customer cues
- Developing – and following – a plan for action.

Booklet 3 Tickler System and Follow-up Actions

About K.I.\$..

How to use this booklet

Success depends on YOU!

Overview of the follow-up call process

Step 1: Assign branch customers to individual team members

Activity 1

Step 2: Set up and maintain your tickler system

Activity 2

Step 3: Regularly contact every customer

Activity 3

Step 4: Use follow-up scripts with powerful benefit words

Activity 4

Step 5: Prepare your sales action plan

Activity 5

Are you ready? (Summary)

Keys to branch sales success: 5 things you must do

This booklet covers the how-to of a practical and functional tickler system.

Learners help build and begin applying a system for calling every customer at least once per year – to deepen relationships and increase sales of products and services.

They also develop scripts with powerful benefit words to use face-to-face and during calls.

Branch Manager's Kit

About K.I.\$..

How to use this booklet

What's included in this kit

How to get started

Keys to branch sales success

K.I.\$. Coaching Checklists for Booklets 1 - 3

Additional K.I.\$. Coaching Tools and Tactics

What keeps employees from succeeding

K.I.\$. secrets to success

Individual employees coaching model

Employee objections – and how to respond

Are you ready?

The manager's kit contains the secrets of effective coaching not found anywhere else.

When branch managers consistently apply these simple steps in conjunction with the 3 employee booklets, sales of products and services have proven to rise significantly.