

LET'S TALK CX Sales Training

Customer experience and relationship building sales training is critical to every organization. Without a strategy behind your team, they are left to their own way of communicating your products, services, and cultural values to your customer. Are you sure their way is your way?

Training to help support your Human Resources Team, Training and/or Mentoring Staff, and your Retail Sales Team.

Award-Winning
Sales Model

Train-the-Trainer
Certification

Tailored
Agenda

Customized
Training

Editable Material
Available

Sales Training | Train-the-Trainer

Learn everything we've learned over years of developing our award-winning sales model, supporting Universal Banker and the customer's appropriate experience.

EACH PROGRAM INCLUDES THE FOLLOWING:

- Two full days of training (with certification)
- Trainer's Manual with scripted teaching guide
- Interactive participant workbook
- Training session PowerPoint
- List of recommended supplies
- Electronic files (PDFs) for all session materials
- Ice breakers/games to reinforce course content
- Role play exercises to practice the skills being taught
- Facilitation best practices for optimal cultural adoption

PRICING:

\$2,499 for first attendee

\$1,799 for additional attendees

Two full days of training in 2 comprehensive, turn-key training programs, including all materials.

ADDITIONAL OPTIONS:

\$750

Customized content including but not limited to your products, services, policies, and procedures.

\$1,250

Customized training material that is editable by your team. Documents available in Microsoft® Word or Microsoft Publisher and Microsoft PowerPoint.



CUSTOMIZED TRAINING

Series I | Customer Service

A Superior Customer Experience

Comprehensive employee awareness of all internal and external forces that affect the customer experience and how to manage that experience, despite the uncontrollable forces.

Customer Service Etiquette

Customer service 101 can be used with employees new to customer interactive roles or as a great reminder of the basics for tenured employees. Everyone will benefit from this course that includes face-to-face, phone, and written etiquette, including handling irate customers and call control methods.

Adapting Communication Style

"The customer is always right" including their preferred style of communication — teach your employees to recognize and adapt their communication to their customers using the DISC method, combined with generational expectations as a foundation.

Series II | Sales Training

Relationship Building Model

Understanding the difference between a salesman and an advisor is critical to gaining trust and expectations. This training module teaches your staff how to move your customers through a step-by-step sales model focused on building relationships and providing solutions rather than selling products.

Effective Profiling: A Sales Tool

Know the right questions to encourage customers to share their needs so your sales team provides the best solution fit to enable retention. This module supports meaningful conversations with customers to build greater relationships. It adapts proper listening skills, ensuring employees are recommending the best solutions to meet the customers' needs and expectations.

Overcoming Customer Objections

This methodology equips your sales team to respond properly while successfully overcoming customer objections. Your team will be able to identify the underlying reasons for an objection and establish methods that are appropriate to negate the objection and steer the conversation back to a successful sell or referral.

Networking for Success

Whether your sales team members have a natural gift for gab or are terrified by small-talk, our easy-to-use networking strategies will create a dynamic sales force when interacting with the community outside of the office.

Creating Bond and Rapport

Customer loyalty should be placed on your sales team with whom your customers interact. To ensure your team makes the most out of every customer interaction, our sales tool helps your team create a greater bond and rapport with your customers while establishing interactive leaders.

Generating Successful Referrals and Product Champions

This curriculum provides a sense of urgency and purpose for your sales team to understand all product solutions offered by your institution, not just the products they are personally responsible to sell.

Turning Service into Sales

Turn basic customer service conversations into need defining opportunities that could result in additional sales or referrals.

Tailored Solutions | Proven Methods | Tangible Results™

Contact Us Today!

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