

CASE STUDY :: CHANGE MANAGEMENT & TRAINING

## Accelerating Implementation and Results of a New Sales & Service Strategy



### Challenge

A regional, independent bank wanted to implement a team approach to increase sales and enhance customer service.

### Solution

Beyond the Arc helped our client design a series of workshops to promote the team-focused approach and drive new behaviors with their bankers.

With this training, we helped our client to:

- **Socialize the vision and rationale** for sales team members to collaborate in growing customer relationships.
- **Connect the vision** to the bank's unique history, willingness to innovate, and focus on personalized service.
- **Communicate best practices** for team selling, joint planning, and joint calling.
- **Provide resources** such as a new incentive plan, CRM screens and tools, conversation-starter scripts, and a call-planning template.
- **Jump-start new behaviors** through case studies and team assignments.

### Results

With our training program, our client accomplished greater acceptance of the new sales strategy because bankers:

- **Understand the rationale** and recognize it has executive sponsorship.
- **Know what's expected** of them and their rewards for performance.
- **Have a best practice framework** and tools to effectively partner with bankers from other lines of business.

### Let's Talk

Toll-free: [1. 877.676.3743](tel:1.877.676.3743)

Email: [info@beyondthearc.net](mailto:info@beyondthearc.net)

Website: [beyondthearc.com](http://beyondthearc.com)

Blog: [beyondthearc.com/blog](http://beyondthearc.com/blog)

Social:

