

First National Banks - July Training

Transcript

<https://otter.ai/u/d5UZLflvIEBkv3UYLSYxgQCzQc?view=summary>

Paul Nunn led a training session for First National Bank employees, focusing on sales skills and customer engagement. Key points included the importance of using customers' names, which Laura successfully implemented, leading to positive customer reactions. Speaker 1 shared a story about a \$650,000 potential deposit from a convenience store owner, emphasizing personalized customer service. Paul discussed handling non-customer checks, suggesting offering membership to avoid fees. He stressed the need for consistent coaching, weekly one-on-one check-ins, and morning huddles to reinforce sales skills. The session concluded with a discussion on improving product knowledge and employee confidence.

Action Items

- Paul Nunn - Create a checklist or competency list to help managers identify employee strengths and areas for improvement.
- Extend the availability of the sales training videos for employees to continue reviewing them.
- Explore options to provide a printable training guide or reference materials for employees.

Outline

First National Banks - July Training Introduction

- Paul Nunn greets participants and notes the absence of Darwin.
- Paul mentions the spreadsheet of everyone's names and how he figured out the correct names.
- Paul jokes about the piano getting locked out of its car.
- Paul outlines the meeting agenda: wins, process, coaching tips, and structure for sales leaders.

Wins and Customer Interactions

- Laura shares a win about a customer using an employee's name, which improved the customer's experience.

- Paul asks about the customer's reaction and how it improved the relationship.
- Speaker 1 shares a story about visiting a client at their business, which led to a potential \$650,000 deposit.
- Paul appreciates the personalized touch and suggests recording the story for future use.

Handling Non-Customer Checks

- Paul Nunn shares a personal experience of cashing a non-customer's check at a credit union.
- Paul discusses the importance of turning non-customers into customers.
- BHintz suggests engaging non-customers to turn them into customers.
- Paul emphasizes the importance of coaching employees to see opportunities in such situations.

Customer Service Analogies and Employee Training

- Paul uses an analogy of sitting in an auditorium to explain the different perspectives of frontline staff and managers.
- Paul discusses the importance of managers showing employees the bigger picture.
- Paul asks if all employees have completed the sales training modules.
- Paul inquires about the experience of working with the Center for Financial Training (CFT) for e-learning courses.

Modeling Sales Skills and One-on-One Coaching

- Paul emphasizes the importance of managers modeling sales skills.
- Paul suggests having an employee check on the manager to ensure consistent behavior.
- Paul outlines four ways to coach consistently: one-on-one check-ins, live observations, morning huddles, and modeling skills.
- Paul asks if participants are conducting regularly scheduled check-ins with their employees.

Effective One-on-One Check-Ins

- Paul recommends starting one-on-one check-ins with employees' time and then moving to business topics.
- Paul suggests asking open-ended questions to encourage employees to share their thoughts.
- Paul discusses the importance of giving employees time to talk about their day.
- Paul advises focusing on strengths, successes, and areas for growth during check-ins.

Morning Huddles and Team Meetings

- Paul asks participants about their morning huddle practices.
- BHintz shares that they highlight successes and provide positive feedback.
- Paul suggests focusing on specific skills during morning huddles, such as asking open-ended questions.
- Paul recommends using role-playing to practice sales skills and improve employee engagement.

Product Knowledge and Employee Confidence

- Paul asks about the improvement of product knowledge among employees.
- BHintz notes that product knowledge and employee confidence are improving.
- Paul suggests assigning each team member a product or service to teach the team.
- Paul emphasizes the importance of practicing sales skills with employees to improve their confidence.

Handling Customer Service Challenges

- Paul discusses how to handle situations where employees follow policies that may hinder customer relationships.
- Paul suggests offering customers options and guiding employees to see opportunities.
- Paul emphasizes the importance of coaching employees to see the bigger picture and improve customer relationships.
- Paul advises using specific, loaded questions to guide employees towards better customer service.

Final Q&A and Meeting Conclusion

- Participants ask questions about the availability of sales training videos and reinforcement materials.
- Paul discusses the possibility of extending the availability of training videos.
- Paul asks if participants would like to continue the training program into the next year.
- Paul concludes the meeting, encouraging participants to keep up the good work and stay consistent.