

The Keys to Bank-to-Business Selling

October 3, 2017



- Key issues facing small business
- Your value to small business
 - advice and expertise
- How to effectively sell to small business
- Your own customers first
- Targeting through profiles and research
- Defining the sales opportunity
- Separating prospects from suspects
- Niches and other products
- Call planning
- Side-business lending

SHAZAM Education Center, CBAI Headquarters, Springfield, IL

Course Introduction

Small business is actively looking for lending and deposit alternatives, often with a non-bank. This engaging seminar looks at the ways a community bank can find small-business loan and deposit opportunities and find them faster than your competitors.

The first strategy is to generate more small-business loans and deposits from your existing customers. The second strategy is to take opportunities from your competitors. This seminar focuses on tactics that help you discover, qualify, and take all available loan and deposit opportunities.

The program focuses on the concepts of identifying opportunities, deciding which businesses make sense to work with, and which businesses you might consider for specialization.

Who Should Attend?

Senior marketing executives, marketing directors, marketing vice presidents, senior retail lenders, senior commercial lenders, senior deposit officers, branch managers, and anyone responsible for increasing loan and deposit volumes in a community bank would benefit from attending this program.

About the Presenter

What Others Have Said:

"The speaker's knowledge and the class participation was excellent. I am taking lots of ideas back to the bank with me."

Jacob Fleming,
Vice President
Security National Bank, Witt

"Fun, upbeat seminar. Duane offered practical solutions and kept me interested all day. He hit on subjects pertaining to our problems and provided solutions."

Justine Mills,
Customer Service Rep
West Central Bank, Ashland

"The seminar was informative and interactive. I left with great ideas."

Angie Seidelman,
Vice President of Lending
The Fisher National Bank

Duane F. Sobecki is the CEO of Focused Results, LLC, a sales strategy, consulting, and training firm. A renowned authority in sales strategy and strategic-market segmentation, Sobecki provides actionable business development, expansion, marketing, and planning strategies to financial institutions.

Sobecki specializes in helping financial service providers to better segment important markets, and direct sales and marketing strategies at those key segments to ensure revenue and profit growth. Sobecki is the principal writer of Rebound Banking, a twice-monthly look at how banks can take advantage of the improving economy, and the author of numerous reports and booklets on key market-segment development.

Sobecki holds a B.S. from the Kelley School of Business at Indiana University, Bloomington, and has a certificate in management planning from the University of Illinois – Chicago. A charismatic speaker, Sobecki has led seminars and workshops on sales and marketing, and management at numerous universities and corporations - and bank associations in the Midwest. With more than 30 years of process consulting and training, Sobecki frequently lectures for a number of universities in their executive education programs.

Key Topics

- Key issues facing small business
- Your value to small business – advice and expertise
- How to effectively sell to small business
- Your own customers first
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Registration Fees

Fees include hand-out materials, refreshment breaks, and lunch. An income-tax deduction may be allowed for educational expenses undertaken to maintain or improve professional skills.

Cancellation Policy

Registrants cancelling two days prior to each seminar receive 100% refund; one day prior, 50%; the day of the seminar, no refund. **All cancellations must be made in writing prior to the seminar day. Invoices and training materials will be sent to all "no shows."**

CBAI MEMBER

One person.....	\$265
Two or more from same banking institution	\$245 each

****PROSPECTIVE-MEMBER**

One person.....	\$465
Two or more from same banking institution	\$445 each

CDD members receive a 10% discount.

**Only financial institutions/firms eligible for CBAI membership.

Registration Form

THE KEYS TO BANK-TO-BUSINESS SELLING

OCTOBER 3, 2017

Please Print

Name of Bank _____

Address _____

City, State, Zip _____

Tel. No. _____

Name/Title _____

E-Mail _____

(E-mail addresses are required for registration).

Name/Title _____

E-Mail _____

(E-mail addresses are required for registration).

I have special needs, please contact me before the seminar.

Please select your payment method.

Check Enclosed Check in Mail

Pay at Door Credit Card*

**If you are paying by credit card, please fill out the following information.
(Visa & MasterCard accepted).*

Name as It Reads on Card _____

Company Name on Card _____

Billing Address of Card _____

Card Number _____ Exp. Date _____

Three Digit Security Code _____



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CBAI Education Department
901 Community Drive
Springfield, IL 62703-5184



Fax it in:
(217) 585-8738



Call it in:
(800) 736-2224
(217) 529-2265

Date and Location

October 3, 2017

SHAZAM Education Center
CBAI Headquarters
901 Community Drive
Springfield, IL 627003
217/529-2265

Agenda

Registration begins at 8:30 a.m. The seminar runs from 9 a.m. to approximately 4 p.m. A Continental breakfast and lunch are provided.

CBAI is a registered Public Accounting Continuing Professional Education (CPE) provider by the Illinois Dept. of Financial and Professional Regulation.

For More Information

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