

Loan Officer Sales Training: *Ask for the Business/Close the Deal!*



October 11, 2019
SHAZAM Education Center
CBAI Headquarters
Springfield, IL



One Mission. Community Banks.

Course Introduction

Attend this proactive seminar and learn how to ask for the business and actually close the deal!

Today's competitive environment requires the loan officer to be able to initially sell the bank's products and services, negotiate the loan terms and conditions, and close the loan, often in diverse situations.

This seminar emphasizes the selling process, customer experience, roadblocks, selling and negotiation skill building, effective communications, telephone techniques, and the marketing model. Additionally, related topics include management skills and styles, and technical skills.

The session also covers the importance of the human side of selling including empathy, ego, and needs along with diversity and psychodynamic issues.

Throughout the session, selling scenarios from the real life of a lender are presented in order to reinforce the selling concepts and improve the bank's overall business development efforts.

Who Should Attend?

Loan officers, relationship managers, business development officers, private bankers and branch managers benefit from attending.

About the Presenter

David Osburn is the founder and managing member of David L. Osburn & Associates LLC, a Las Vegas-based business training and contract CFO firm that provides seminar/keynote speeches for various groups including CPAs, bankers, attorneys, trade groups and business owners. He also serves as a contract CFO for several clients including construction companies, medical practitioners and real-estate developers. Osburn co-manages a bank educational program with the University of Nevada – Las Vegas, and is a board member of North Star Business Services, a commercial lending company (commercial real estate and equipment financing).

His extensive professional background encompasses over 24 years in banking, finance and marketing. His bank commercial lending credentials include comprehensive loan underwriting, management, customer development and loan work-out experience. In addition, Osburn is an adjunct professor for Regis University, Denver, an accredited MBA program, and the College of Southern Nevada, Las Vegas, a community college. He has taught college courses for over 22 years, covering finance, accounting, economics, marketing, banking, business law and management.

Osburn earned an MBA in finance/marketing from Utah State University, Logan, and a BS in finance from Brigham Young University, Provo, UT. He is also a graduate of the University of Oklahoma, Norman, National Commercial Lending School.

Key Topics

- Selling: Defined
- Selling process and customer experience
- “Roadblocks” in selling
- Selling and negotiation skill building
- Communications and telephone techniques
- The marketing model
- Management and technical skills
- The human side of selling including diversity and psychodynamic issues
- Case studies: selling and the lender



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

**LOAN OFFICER SALES TRAINING:
ASK FOR THE BUSINESS/CLOSE THE DEAL!
OCTOBER 11, 2019**

Please Print

Name of Bank _____

Address _____

City, State, Zip _____

Tel. No. _____

Name/Title _____

Email _____
(E-mail addresses are required for registration).

Name/Title _____

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

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901 Community Drive
Springfield, IL 62703-5184



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(800) 736-2224
(217) 529-2265

Date and Location

October 11, 2019

SHAZAM Education Center
CBAI Headquarters
901 Community Drive
Springfield, IL 62703
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

Tracy McQuinn, Senior Vice President
Melinda McClelland, Vice President
Jennifer Nika, Vice President
Tina Horner,
Administrative Assistant
Kim Harden
Administrative Assistant
Department of Education
& Special Events
800/736-2224 217/529-2265
Fax: 217/585-8738
Terry Griffin,
Vice President Chicago Area
773/209-2260

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