

Collaborative Business Conversations

Conduct focused conversations that result in targeted solutions



SELF-PACED
E-LEARNING

2-3
HOURS



SKILLS
APPLICATION
LAB

2
DAYS

OVERVIEW

This program, which includes a self-study E-Learning course and an immersive Skills Application Lab, empowers participants to increase sales and decrease cycle times by equipping them with a targeted sales process specifically designed to address a commercial entity's banking needs. By learning how to integrate their knowledge of credit risk with an understanding of a business's strategies and operations, participants can have well-planned, focused conversations that result in targeted solutions.

WHO SHOULD ATTEND

Anyone who interacts with commercial clients, including relationship managers, portfolio managers, risk managers, risk underwriters, branch managers, and credit officers. In order to take the SAL, participants must pass the E-Learning course with an assessment score of at least 80%.

RESULTS AND BUSINESS BENEFITS

Upon completion, participants will be able to:

- Use a proven relationship-building process to plan and execute results-oriented sales calls
- Increase sales and reduce cycle times
- Achieve greater product penetration per customer
- Differentiate your financial institution from the competition
- Build collaborative relationships with key managers

LEARNING TOPICS

1

Prepare for Meeting

2

Position Meeting

3

Identify Needs and Opportunities

4

Ask the Right Questions

5

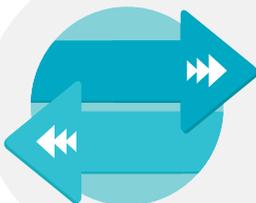
Create Options and Present Targeted Solutions

6

Obtain Commitment

7

Establish Next Steps



BLENDED LEARNING BY OMEGA PERFORMANCE

The Omega Performance blended learning experience helps participants learn critical skills, deepen comprehension, and improve on-the-job skill application and sustainment. Self-paced E-Learning courses present learning objectives and enhance understanding in a highly-interactive online environment, while in-person, instructor-led Skills Application Labs (SALs) provide participants with the opportunity to collaboratively apply skills to real-world cases.

MOODY'S
ANALYTICS

omega
performance

LEARNING SOLUTIONS

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