

# Pohl Consulting and Training, Inc.



## Relationship Sales Workshop

November 5<sup>th</sup>- 7<sup>th</sup>, 2025

DoubleTree • 3003 Corporate Drive • Lisle, IL

### Learn and Grow

#### Discovery Skills

Stop pushing products and learn about your prospect's deeper needs. Ask the right questions so you can serve your clients better.

#### Build Trust with Prospects & Clients

Demonstrate your expertise by asking the right questions and developing a keen understanding of your prospects' unique needs.

#### What Motivates Your Prospects?

Learn to present holistic solutions to the problems that are individualized to each prospect and client.

If your current or desired position in your organization carries an expectation that you build relationships that enhance company revenue...

#### This workshop is for you!

If you are a sales veteran who has reached a production plateau...

#### This workshop is for you!

If sales presents a new career challenge...

#### This workshop is for you!

If you are working harder at sales and enjoying it less...

#### This workshop is for you!

Loan Officers  
Private Bankers  
Personal Bankers  
Sales Manager

Trust Officers  
Branch Managers  
Insurance Agents  
Wealth Advisors

Investment Representative  
Mortgage Originators  
Financial Advisors  
Business Development Officers

Wealth Management models, private client service models, integrated models, and traditional product line models each depend on relationship management skills and a sales process that allows the staff to maximize its success. The skills and processes taught in this workshop can give any individual the opportunity for that success. Best of all, anyone who is in the financial services business in order to help people get what they want in life will discover a higher level of job satisfaction.

We emphasize the process (while also practicing skill enhancement) because we see this process as the missing piece for people and organizations that have reached a plateau or faltered in their sales development efforts. This workshop provides a true impact event- it creates a total experience of learning and reflection to truly affect your future. If what is learned is applied consistently, it will have a very positive impact on your sales and retention results- and on your career!

The investment for this workshop is \$1495 for each participant. Lunches and all workshop materials and tools are included in your investment. Participants are responsible for their travel, lodging, and any meals outside the workshop.

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## Testimony

*"After 25 years, I had been through about every kind of sales training you could imagine. It had all been the same: fidget in a hot/cold room for 3 or 4 days, then go back to the office and try to clean up the earthquake that had hit in my absence. I remember grumping that 'my customers come first, and I can't be doing all this stuff or they would suffer.'"*

*"I took a chance and started using what I learned by exploring my book of business in a small way. That way, I figured I could still do what made me happy and at least try out this new process, too. As I picked up the phone, scheduled meetings and started listening and probing, a surprise number of those clients started revealing that they had other assets and needs that I had not even dreamed were there!"*

*"All of a sudden, in a short period of time, my original view of how to serve my customers and be happy in my job had changed radically. Now I see that they are best served if they are completely served- **all** their needs and goals identified and explored, a strong feeling of trust and confidence created, and a sense of personal caring communicated to them (regularly!). Today, I find I look forward to making calls and growing relationships; it's fun to see how much I can learn in a single call, to nurture the relationship and to see customer confidence build."*

## WORKSHOP AGENDA

### PreWork

Orientation Session  
Homework Reading  
View Recorded Session

### Day 1

8:00 - 9:00 Introductions and Welcome  
9:00 - 10:00 The Right Mental Attitude About Sales, Customers, Your Products and Yourself  
10:00 -10:15 Break  
10:15 -12:00 Homework Review- Foundation Skills (Building EBA, Listening, Questioning and Finding Goals)  
12:00 -12:45 Lunch  
12:45 - 1:45 Personality Style- Connecting with Individuals  
1:45 - 2:30 The Discovery Process- Key Behaviors & Outcomes  
2:30 - 2:45 Break  
2:45 - 4:15 Demonstration Role Play (Discovery)  
4:15 - 5:00 Case Study Assignments

### Evening

Homework Study assigned cases

### Day 2

7:30 -12:15 Individual Discovery Role Plays (In Small Groups)  
12:15 - 1:00 Lunch (Working Lunch) What did you learn?  
1:00 - 2:00 Demonstration Role Play (Presentation)  
2:00 - 3:00 How to Make an Effective Presentation  
3:00 - 3:15 Break  
3:15 - 5:30 Case Planning Workshop & Presentation Preparation

### Evening

Homework Work on Presentation

### Day 3

8:00 - 8:30 Review and Finalize Presentation  
8:30 - 9:15 Effective Response to Objections  
9:15 - 12:30 Individual Presentation Role Plays (Small Groups), Working Lunch  
12:30 - 1:30 The Relationship Management Circle  
1:30 - 2:00 Wrap up

# Pohl Consulting and Training, Inc.

## RELATIONSHIP SALES WORKSHOP REGISTRATION FORM

Please send the completed registration form and a check for \$1495\* (lunches included in base price) for each workshop participant to:

**Pohl Consulting and Training, Inc.**  
**PO Box 287**  
**Rochelle, IL 61068**

Or you may fax the registration form to: 815-561-3573

**\*Early discount registration price of \$1295 if registration and check are received by October 15, 2025.**

Please enroll me for the following area in the November 5-7, 2025 Sales Workshop:  
(Your case assignment and planning materials will be based on the area you select)

<input type="checkbox"/>	Private Banking	<input type="checkbox"/>	Institutional Investment
<input type="checkbox"/>	Retail Banking	<input type="checkbox"/>	Employee Benefits
<input type="checkbox"/>	Commercial Banking	<input type="checkbox"/>	Personal Trust
<input type="checkbox"/>	Investment Rep / Advisor	<input type="checkbox"/>	Insurance Agent

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Street Address**			
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E-Mail Address			

\*\* NO P.O. Boxes PLEASE! UPS cannot deliver material to post office boxes.

### Hotel and Ground Transportation Reservations:

The DoubleTree by Hilton Lisle/Naperville is conveniently located near O'Hare and Midway airports. The hotel can be reached at 630-505-0900.

As a participant in this Workshop, you will receive a discounted rate on your hotel accommodations. If your reservations are made by phone, please mention that you are with Pohl Consulting and Training for the Relationship Sales Workshop to receive the hotel discount.

The workshop begins promptly at 8:00 AM on Day 1; we suggest you arrive the evening before.

For further information on the DoubleTree by Hilton Lisle/Naperville or the Relationship Sales Workshop, please contact our office. We can be reached at 800/677-7432 ext -4001-

**Cancellation Policy:** Cancellations accepted up to **30 days** prior to Workshop with a **\$50 Service Charge**. Substitutions only accepted thereafter.