Pohl Consulting and Training, Inc.

Relationship Sales Workshop

May 5th - 7th, 2027

DoubleTree | 3003 Corporate Drive | Lisle, IL

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…

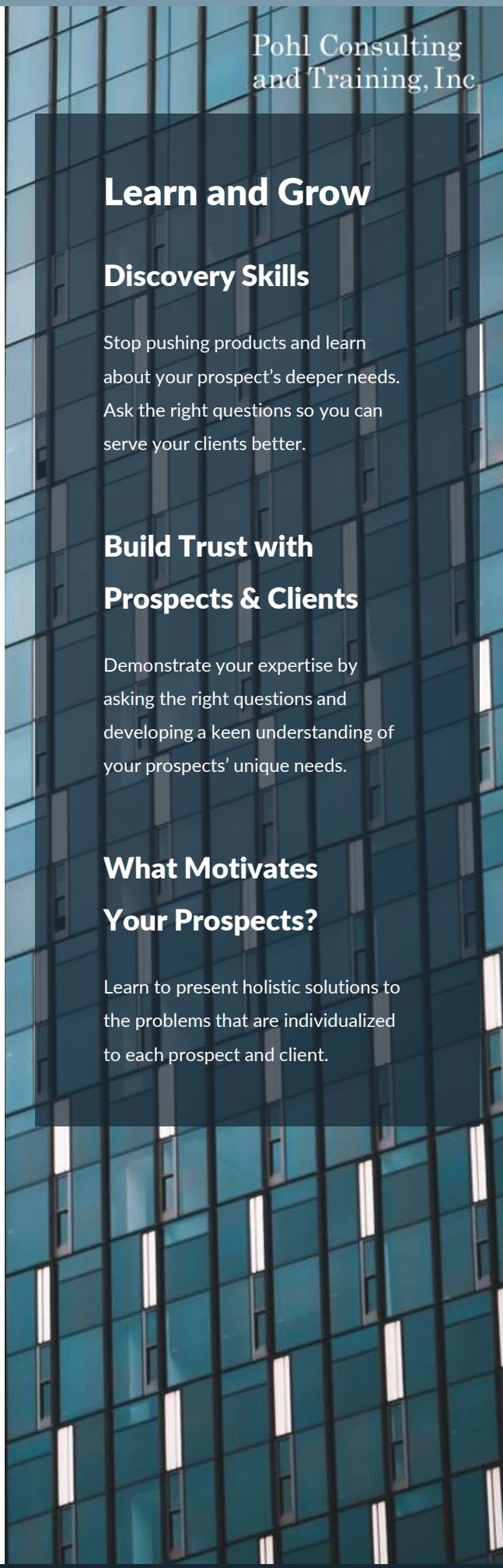
This workshop is for you!

Loan Officers	Trust Officers	Investment Representative
Private Bankers	Branch Managers	Mortgage Originators
Personal Bankers	Insurance Agents	Financial Advisors
Sales Manager	Wealth 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.



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.

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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

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."

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Relationship Sales Workshop Registration Form

May 5th-7th, 2027
DoubleTree | 3003 Corporate W. Drive | Lisle, IL 60532

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

PO Box 287, Rochelle, IL 61068
Phone: 815-561-3570

Or you may email the registration form to Tanya Canfield at tcanfield@pohlconsulting.com

*Early discount registration price of $1295 if registration and check are received by April 13, 2027.

Please enroll me for the following area in the May 5-7, 2027 Sales Workshop:

(Your case assignment and planning materials will be based on the area you select)

Private Banking _____ Institutional Investment _____

Retail Banking _____ Employee Benefits _____

Commercial Banking _____ Personal Trust _____

Investment Rep / Advisor _____ Insurance Agent _____

Registrant _____ Nickname _____

Title _____ Department _____

Company _____

Street Address** _____

City _____ State _____ Zip _____

Telephone _____ Fax _____

E-mail _____

Please send invoice to _____

****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.