

# CONSULTATIVE CONVERSATIONS™

## CURRICULUM OVERVIEW

The credit union landscape has changed significantly over the past decade. As a result, how you engage with your members is different, and you must adapt to meet the changing member experience.

Consultative Conversations is a sales training program tailored for credit unions to help change your sales culture and improve member relationships that drive increased revenues and productivity.

This impactful learning experience introduces the Consultative Conversation Model, a 5-stage member sales conversation process with building relationships at its foundation. Participants engage in practical, first-hand interactions to develop skills and techniques to build strong relationships with members, uncover member needs and make compelling recommendations that improve the financial well-being of members.

### Program Benefits:

- Increase trust with Members
- Improve listening skills
- Uncover member needs and concerns
- Optimize every member interaction
- Create a member-centric sales culture
- Improve cross-selling and wallet share

### Workshop Length:

- Two days onsite or seven 2-hour VILT sessions

### Delivery Options



#### Instructor-Led Training



#### Virtual Instructor-Led Training

### Customization

SRG understands that each organization has a distinct culture, with unique processes, abilities, and challenges.

Our training services include pre-training consultation to inform case studies, examples, and exercises customized to your organization and the needs of program participants.



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**The program includes a workbook, exercises, tools, and job aids that facilitate the transfer of learning and retention.**

## **Lesson 1**

### **Build Relationships**

- Understand the Consultative Conversation Model
- Use three techniques to build stronger relationships with Members
- Apply active listening skills to increase rapport

## **Lesson 2**

### **Open the Conversation**

- Address the Member's presenting need
- Expand the conversation
- Consider the products and services of value to Members in different life stages

## **Lesson 3**

### **Identify Needs**

- Identify how Members think about their financial needs
- Ask consultative questions to identify Member needs
- Create motivation for Members to act

## **Lesson 4**

### **Recommend Solutions**

- Connect your solution to the Member's needs
- Present the value of your solution
- Confirm the solution's value to the Member

## **Lesson 5**

### **Manage Feedback**

- Prevent common objections
- Manage challenging objections
- Use positive feedback to expand the opportunity

## **Lesson 6**

### **Gain Commitment**

- Identify when to ask for a commitment
- Help Members commit to taking action
- Assess your Member conversations



# WHY SALES READINESS GROUP (SRG)

HEAR OUR CLIENTS TALK ABOUT THEIR EXPERIENCE WORKING WITH SRG



“

We were about 30% to goals in loans. In the past two months, we hit 80% of goals for loan growth.

People First Credit Union

Three of our Credit Union client shared unsolicited praise for SRG during an expert panel event. Watch now to learn why.

## A complete sales training system

### Sales Training is a Process, Not an Event

Our training programs are not single events but rather part of an overall sales training system designed to create sustainable changes in sales behaviors. The net result is that our training sticks.

### Our comprehensive approach includes:



#### Consultation

Committed to understanding your business goals first.



#### Customization

So the training is highly relevant for real-work challenges.



#### Reinforcement

Ongoing reinforcement to make new habits stick.



#### Experiential Training

Because participants learn best by doing.



#### Measurement

Assess the impact of the training program.

## When results matter, choose an experienced training company with a track record of success.

Our leadership team brings over 100 years of combined sales and sales management experience to the table. We've successfully trained organizations in competitive industries like Life Sciences, Technology, Financial Services, Professional Services, and Manufacturing.

That's why Selling Power Magazine has ranked us as a Top Sales Training Company for over a decade.

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