



Service to Sales

Frontline Sales Training

Powered by **Pinnacle**

A service-based
approach to sales
training that focuses on
meeting the needs of
your accountholders

Pinnacle Financial Strategies

The Business for Better Banking



SERVICE TO SALES FRONTLINE SALES TRAINING

Our training program is designed to provide frontline employees with tools that will improve your accountholders' service experience.

Every financial institution wants to provide a higher level of service to its accountholders.

Every financial institution also wants to increase product sales. Fortunately, these two goals are not mutually exclusive. Pinnacle Financial Strategies' Service to Sales training program helps improve your frontline employees' sales skills and confidence, which will enhance their level of service and increase product sales.

Your frontline employees are the friendly faces of your institution, and it's crucial to make sure they have the tools necessary to provide a high level of service that stands out from the competition. We understand that many community banks and credit unions may not have extensive training resources, and they often do not know where to begin to develop a sales training program. That's why Pinnacle's team acts as a catalyst to help you train your frontline employees to overcome challenges and build long-term relationships with accountholders.

The Service to Sales program gives your employees the knowledge and confidence to transform their sales mindset from passive to active, boosting attentiveness to accountholder needs and energizing bottom-line results in the process.

IT STARTS WITH YOU.

- We begin by assessing your specific needs and metrics for success.
- Certain aspects of the process are customized to maximize effectiveness.
- If you have a program in place, we can reinforce your current practices to optimize performance.

KNOWLEDGE IS PARAMOUNT.

- We stress the importance of employees having deep knowledge of the products your institution offers.
- We arm employees with the information to confidently meet the needs of your accountholders.
- Our training builds skills that improve accountholder retention, improve service, and produce a better experience for your accountholders.

THE PROGRAM IS COMPREHENSIVE.

- Our focus is to uncover accountholders' needs and help your financial institution meet your sales goals.
- The training includes management interviews, a facilitators' guide, participant reference materials, role-plays, and more.
- We conduct research and secret shopping to assess your current practices and test the effectiveness of the training.



Our program uses seven simple steps to help you attain the success you seek.

Here's what that success means for your employees:



“Success is neither magical nor mysterious. Success is the natural consequence of consistently applying the basic fundamentals.”

– Jim Rohn



“A sale is not something you pursue; it's what happens to you while you are immersed in serving your customer.”

– Zig Ziglar



At Pinnacle Financial Strategies, our customizable performance measurement programs, overdraft privilege services, streamlined account opening, debit card program optimization, cash-back rewards programs, and frontline and business training solutions are designed to help institutions gain a competitive edge, attract and retain accountholders, and improve profitability.



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