

Develop a **Sales Culture** That Will Help You Attract **Customers & Producers**

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Understanding WHY (Beliefs)

WHY Do You Need a **Strong Sales Culture**?

WHY DON'T Customers Use Your Bank For ALL Their Needs?
WHY Does Your Sales Team Struggle To Achieve ALL Their Annual Goals?

Power of Story Telling: Your Value Proposition
Tell a Compelling Story About How You Saved a Customer.

Service Provider versus **Finance Professional**

CULTURE

Leadership Excellence Model

1. **WHY** Do You Need Culture?
2. **WHAT** Is "Culture"?

Culture Statement

Support

Define your Sales Culture:

At _____ Bank we want our Customers to ALWAYS Feel:

(Three Feeling Words)

- 1.
- 2.
- 3.

So our Bankers are ALWAYS committed to: (Three Action Phrases)

- 1.
- 2.
- 3.

CLARITY

Leadership Excellence Model

1. **WHY** Do You Need Clarity?
2. **WHAT** Requires Clarity?

Pursuit of Happiness

Strategic Clarity

Why do you go to work every day? What makes you Happy?

If you earned 50% more income, **how would you spend it?**

If you only worked 3 days a week, **how would you spend the other 4 days?**

How Do You Reward Your Sales Team?

GREAT Growth Strategy Review

Strategic Clarity

HOW Do You Create Your **Sales Strategy**?

WHY Is **Collaboration** So Important?

HOW Do You **Collaborate**?

PLAN For Success

Strategic Clarity

PLAN Creation:

WHY Do You Need a PLAN?

WHY Do PLANS Fail?

PLAN Reviews:

WHY Review The PLAN?

WHY Do PLAN Reviews Fail?

Step 1) S.W.O.T. Analysis

Strategic Planning

STRENGTHS (Internal – Controllable)

What do you do well for your customers?
What makes you different?

WEAKNESSES (Internal – Controllable)

What are some of your limitations?
When have customers complained about?

OPPORTUNITIES (External – Uncontrollable)

What markets do you service well?
What are the size of your markets?

THREATS (External – Uncontrollable)

What do your competitors do better?
What are your market limitations?

Step 2) **WHY, WHAT & HOW**

Strategic Planning

WHY

WHY do YOU want to Succeed?

WHY will this Strategy Succeed?

WHY won't this Strategy Succeed?

WHAT

WHAT are your Specific Goals?

WHAT is your Value Proposition (Strengths)?

WHAT are your Target Markets (Opportunities)?

HOW

HOW will you Engage, Persuade & Retain your Targets? **List Specific Activities**

HOW will you Overcome Weaknesses?

HOW will you Handle Threats?

Step 3) Monthly Activity P.L.A.N.

Strategic Planning

Name		Date:
Personal Goal		

<p style="text-align: center;">P</p> <p style="text-align: center;">PERFORMANCE METRICS</p> <p style="text-align: center;">Results vs Targets Last Month / YTD</p>	<p>List Specific Bank Goals & Metrics</p>
<p style="text-align: center;">L</p> <p style="text-align: center;">LEARNINGS</p> <p style="text-align: center;">Personal Development Objectives. Coaching Support.</p>	<p>List 3 Coaching / Training / Support Needs</p>
<p style="text-align: center;">A</p> <p style="text-align: center;">ACTIVITIES</p> <p style="text-align: center;">Specific Core Goal Activity & Monthly Frequency.</p>	<p>List 5 Key Activities (and Ideal Monthly Frequency)</p>
<p style="text-align: center;">N</p> <p style="text-align: center;">NUMBERS & NEXT MONTH</p> <p style="text-align: center;">Pipeline Probability. Specific Activity? Specific Support?</p>	<p><i>{Leave Blank}</i></p>

CONFIDENCE

Leadership Excellence Model

1. **WHY** Do You Need Confidence?
2. **WHAT** Requires Confidence?

Sales Excellence Model

Skill Development

What are the **Key Elements** of a **Highly Influential Customer Meeting**?



TEAM TRAINING PLANNER

COMPETENCY:

Date:

LAST SESSION REVIEW – KEY LEARNINGS & FIELD EXERCISE

1. CONTENT – SKILL COACHING (SHARE RESEARCH & EXPERIENCE)

2. CONVERSATION - BEST PRACTICES DISCUSSION (ASK QUESTIONS)

3. COMMITMENT – PRACTICE SUGGESTION (ASSIGN FIELD EXERCISE)

CONSISTENCY

Leadership Excellence Model

1. **WHY** Do You Need Consistency?
2. **WHAT** Requires Consistency?

Sales Training Cadence

Structure

What Does Your **Sales Training Cadence** Look Like?