

MARKS & ASSOCIATES

SEMINAR SERIES

SHORT DESCRIPTIONS OF AVAILABLE COURSES

Marks & Associates' training team comprises nationally-recognized experts who have faced the same sales and marketing problems that you face on a daily basis. Because of this comfort and fluency, we can easily adjust a seminar's focus between market size, industry specific segments (high tech, real estate, manufacturing or distribution, capital markets, international, agriculture and more), depending upon the needs of your organization or of a particular set of participants. Sessions are focused on changing behavior patterns, not on simple education.

Consultative Selling Seminars

A series of highly interactive sessions lead participants through discussions, role plays, and case studies designed to heighten their product association skills; to improve their ability to identify problems/opportunities and to provide pragmatic solutions for the client / prospect. The series dramatically increases a salesperson's ability to adapt to various sales situations and prospect personality styles. The series' primary objective is to give participants exactly the tools they need to sell more and increase profitability.

Consultative Selling Part I: This class teaches participants the skills needed to prepare for a sales call; to identify and analyze the physical environment and personality of the customer/prospect; to question the customer/prospect and elicit information that leads to diagnostics of the company's problems and needs and to handle sales objections.

Consultative Selling Part II: This course is focused on closing the sale. It uses case studies and extensive role playing to reinforce and help participants master diagnostic and selling skills introduced in the first session. Emphasis is placed on skills necessary to understand and communicate the benefits of your products and to sell them effectively. Cases and role-plays can be tailored to your firm's marketplace.

Sales Management

Geared specifically to staff who function as sales managers, this session focuses on the difference between sales and sales management skills. It shows participants how to manage their staff more effectively and how to evaluate, motivate, and correct performance and skill problems quickly. In addition to working through coaching and counseling segments, participants learn how to identify, understand, and work with different personality styles. Also covered are topics that show sales managers how to collect, analyze and use competitive intelligence, how to interview and hire good sales staff, and how to set up and run meaningful sales meetings.

Building and Managing Key Relationships

Understanding the client in their marketplace

A strategic approach for enhancing relationships

Designed to integrate strategic planning with consultative selling, this workshop uses a combination of lecture, discussion, role-play, case studies and other activities to sharpen participants' strategic vision and planning skills. In addition, the workshop is structured in a way that encourages and builds teams and team spirit. The workshop is designed to help the participants understand the importance of a wide range of factors as the prospect would view them: Technological change, interest rates,

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market demand, political or regulatory issues, growth, downsizing and the entry or exit of competitors are all factors that affect the health and future course of prospects and customers. The class teaches participants what changes to look for and how to match products and services to those changes. At the conclusion of the class, the participants are capable of developing an 18-month plan for prospects and clients. This enables them to sell more deeply into each account, and to help the customer or prospect better plan for the future. Participants work with real-life examples derived from their own experience, expertise and knowledge of the firm's products

The workshop ties planning to the basic milestones encountered in every relationship including: The Sale; Implementation And Other Problems; Additional Product Opportunities; Operational Problems; Turnover; Price Changes, Indifference And Neglect; Loss And The Attempted Save. Discussion, case studies and role plays show participants how they can help postpone, hasten or moderate the financial impact of these milestones by monitoring, managing and planning for a variety of forces both internal and external to the company. Those forces include turnover with the company, business expansion/contraction, changing levels of service demand and quality, company politics, changing market and business goals, new systems and reorganization.

Cash Management Seminar

Taught from a benefits/solutions perspective, this session is designed for those who need a solid grounding in the fundamentals of cash management. The focus is on how products help the firm, how they work, and reasonable expectations. Attendees learn the basics of the check clearing system, float and availability schedules. Interactive discussions introduce cash management from the bank's and their customer's perspective and how to more effectively identify needs for all major cash management products groups including: lockbox, controlled disbursement, ZBA's, ACH concentration, wire transfers, account reconciliation, positive pay, information reporting, electronic commerce and more. At the conclusion of this class, attendees will be much better able to understand, select and use cash management services. The session complements the Consultative Selling Series if your firm is involved in selling financial services and can be tailored to fit your firm's needs. The AFP has certified this class for CCM Credit

Negotiation Skills

Because most negotiators compromise and accommodate too much, this two-day seminar teaches how to get more from each negotiation. Good negotiators separate people from problems, focus on interest not positions, create options for mutual gain, and make decisions using objective criteria. Realistic cases and role-plays help participants apply and practice pragmatic negotiating skills. Cases can be tailored to your marketplace. The material fully integrates with the Consultative Selling Series, so that attendees learn a consistent, comprehensive approach to the full-spectrum of selling skills.

A Seminar for Customers and Prospects to be used as a Marketing Device

Designed as an education/marketing event, your firm hosts this one-day session for your customers and prospects. The intent is to generate interest in financial services. The session focuses on topical issues in cash flow, such as fraud, the Internet, and electronic commerce, and explores the bank's efforts to address these issues through product enhancements and new product development. Executives, relationship / sales managers, and other key staff are encouraged to attend because the session provides an opportunity to impress your most sought-after customers and prospects. These sessions can be customized to your specific products and target marketplace

How to Create and Deliver Effective Proposals

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Proposals should be designed to tell prospects exactly how the bank's products will help them. They must be clear, concise, easy-to-read, and focused. They are sales tools, not advertising. This seminar teaches bankers how to handle proposal requests and how to design and write proposals that actually sell. Attendees learn how to construct, package and deliver proposals effectively and efficiently.

Selling at Trade Shows

Setting up a booth and collecting business cards is not an effective use of valuable trade show time. This session teaches bankers how to make the most of trade shows through better booth management, more effective demos/presentations, customer/prospect "hooking," effective use of trade show marketing materials, and trade show "note-taking." The class uses role-play and discussion which can be customized to your bank. Additional options include booth consulting and developing customized trade-show materials and drop literature.

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