

Case Study: Great Southern Bank Springfield, Missouri

Commercial loan officers' boost sales tactics, see pay-off

By Christine Van Matre



Great Southern Bank wanted their commercial loan officers to be ready – prepared to compete in an increasingly difficult sales milieu, and geared up to take on that challenge by making the most of their time. “Great Southern Bank wanted to prepare their loan officers for a more competitive selling environment, and their loan officers also needed better time management skills,” says consultant and sales specialist Mark Holmes. “When the phones don’t ring as often, it will be critical for them to capitalize on selling the deals they want to close.”

To reach these goals, Great Southern Bank (a leading sales performance bank) asked Holmes to put his 20 years of sales knowledge to work and train the bank’s commercial loan officers to reach the next level.

Holmes began by assessing the group’s needs. Then he zeroed in on those needs, creating training and a coaching process that fit the team’s needs and each loan officer’s. Accountability is built

into the training in order to build the bridge between knowledge and results. One-on-one coaching kept the training tied closely to each loan officer’s needs. Holmes also created online sales tools, such as a Daily Sales Call Planner, for the loan officers to use.

Fear of closing is a common sales force ailment, but Holmes delivered the cure. “After training with Mark, I was able to improve my daily interactions with present clients as well as prospects,” says Commercial Loan Officer Kent Lammers. “I’ve had success establishing my clients’ timeframes and using that knowledge and your principles to advance the close. You’ve even helped me manage my day, rather than my day managing me.”

More feedback came straight from the top. (“My sales associates’ growth as sales people and individuals is evident,” says Vice President of Commercial Loans Gary Lewis. “I feel your techniques have benefited both Great Southern Bank as well as those who participated. Your efforts are appreciated and *the results are obvious.*”

Another Great Southern Vice President is using Holmes’ training to get results in tough sales

situations. “Let me share a highlight from a sales call during which I used the tools you taught me,” says James Brookhart. “This call with a major prospect was successful because I was ready for his objection and I handled it by using your comebacks. When he resisted, I stuck to the strategy, and walked out with what I wanted. Whether I get the deal or not, it was powerful evidence that *these techniques really work!* Thank you for helping me understand the value of being thoroughly prepared for my sales calls.”

After going through the nine months of training, Great Southern Loan Officer Summer Massey estimated her skill level *more than doubled* in many areas. Holmes says that’s one reason he doesn’t train for just a day or two. “Training over nine-twelve months helps the training stick and gives the client a return on their investment that will last – that’s what gives this process merit,” he says.

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