For: _____

Establish your objective

What is the primary goal you want to accomplish? Try to be *SMART* about it (<u>Specific</u>, <u>Measurable</u>, <u>Attainable</u>, <u>Realistic and Timely</u>).

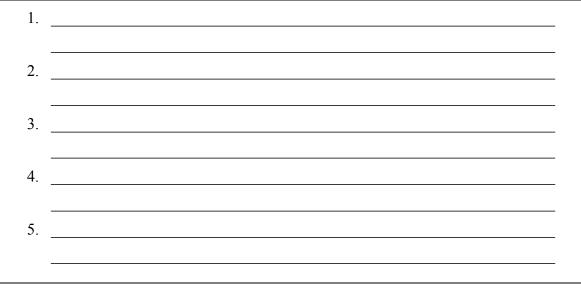
Step One: List your top 5 target customer segments (to increase *wallet share*)

These would include categories of customers that you want to get more business from. They could be Realtors, specific companies, certain types of customers (loan customers without checking), heavy ATM or debit card users, etc... Double check reports and other internal resources that help determine who the profitable relationships are for your institution.

1.	
2.	
2	
3.	
4.	
5.	

Step Two: List your top 5 prospects (to increase *market share*)

Identify other areas where you could generate more business. Are there niches that you are currently serving now that have other opportunities in your community (education, healthcare, manufacturing, electronic banking, etc...). If there are profitable categories of customers from One (above), look for prospects in similar industries.



Instructors: Eric & Alicia Cook

			help in the process oals and what role they	will play.	
1			/		
2					
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4					
5.					
J					
Step Four: Creat					
	sonalized notes to dev or prospects on a regu	eloping an out-of-c lar basis.	something as simple as office calling plan to get	t out of the bank and	
	Week 1	Week 2	Week 3	Week 4	
Monday					
Tuesday					
Wednesday					
Thursday					
Friday					
Weekend					
Will you			, I		
Will you	all Them?		See Them?	9	
Mail Them?			E-Mail Them?		
		sary follow-up (phone calls, thank y		
and tie up any loo		-	-		

Step Five: Outreach and awareness List things that you can do to get your message out so people know who you are and what you do. These items could be things like e-mail messages and taglines, direct mail campaigns, online tools (like blogs or
Facebook pages), etc Be consistent!
1
2.
3.
4.
5.
Step Six: Create your "personal brand"
Pick five things that you can start to use that will help to create your own personal brand.
1
2
3
4
5
Step Seven: Develop a networking plan What are some of the things that you can do to get more "face time" with customers and prospects on a monthly basis?
1
2
3
4
5
Step Eight: Educate yourself
What can you do for an hour each week to improve yourself? Read a book, industry journal, bank literature on products/services you don't know well, attend training seminars, podcasts, webinars, etc
1.
2.
3.
4.
5.

Ston Nino: I	Review and adjust	
Review this pla	lan on a regular basis and adjust areas that need modification every month. This will b	e a
"work in proces	ess" and over time will develop into a useful tool for your sales efforts.	
Step Ten: St	stay motivated	
What are some	e of the things you can do to stay motivated?	
1		
2.		
4		
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Notore		
Notes:		