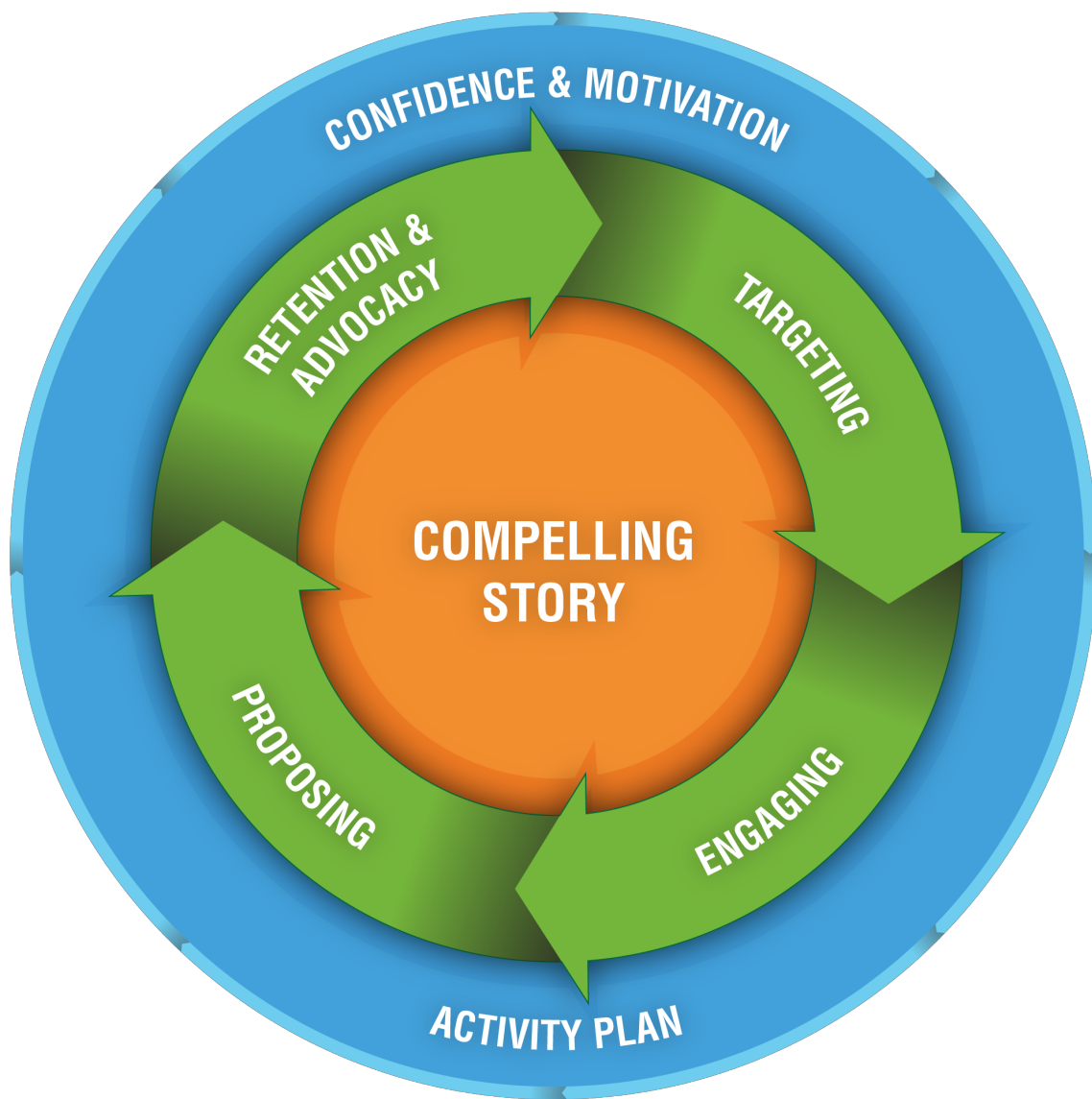


**BE MORE SPECIFIC – Secret Ingredient For Strategic Success**  
**WHAT, HOW & WHY – SEVEN BUSINESS DEVELOPMENT ESSENTIALS**



**WHAT, HOW & WHY – STRATEGY REVIEW – PART ONE**

<b>WHY</b>	<b>STRATEGY</b>
<b>WHY SUCCESS IS IMPORTANT?</b>	<ul style="list-style-type: none"><li>• WHY is achieving annual goals important to you, the Bank and your staff?</li><li>• WHY would you be willing to change what you do?</li></ul>
<b>WHY BE SPECIFIC?</b>	<ul style="list-style-type: none"><li>• Why does it make sense to BE SPECIFIC?</li><li>• Why would you be concerned about specializing?</li></ul>

**WHAT, HOW & WHY – STRATEGY REVIEW – PART TWO**

<b>WHAT</b>	<b>STRATEGY</b>
<b>COMPELLING STORY</b>	<ul style="list-style-type: none"><li>• WHAT customer success stories can you tell?</li><li>• WHAT markets/industries do you service well?</li><li>• WHAT SPECIFIC problems do you solve?</li><li>• WHAT makes you different (value proposition)?</li></ul>
<b>TARGETING</b>	<ul style="list-style-type: none"><li>• WHAT are (can be) your SPECIFIC Target Markets?</li><li>• WHAT is the size of the opportunity?</li></ul>

## WISH Statement - A Better Introduction Guide

<p><b>W</b></p> <p>Who are you? What is your title? Who is your Bank?</p>	
<p><b>I</b></p> <p>Give <b>interesting information</b> about your <b>Target Market</b>. Highlight an <b>issue</b>. <b>Inspire</b> further conversation. Create <b>intrigue</b>.</p>	
<p><b>S</b></p> <p>Describe your SPECIFIC SOLUTION or SERVICE</p>	
<p><b>H</b></p> <p><b>HOW</b> can they engage you? <b>HOW</b> can they help you? Next steps. Call to action.</p>	

**WHAT, HOW & WHY – STRATEGY REVIEW – PART THREE**

<b>HOW</b>	<b>STRATEGY</b>
<b>ENGAGING</b>	<ul style="list-style-type: none"> <li>• HOW do you reach your targets?</li> <li>• List SPECIFIC engagement activities.</li> <li>• Marketing Support? Coaching Needs?</li> </ul>
<b>PROPOSING</b>	<ul style="list-style-type: none"> <li>• HOW effective is your Sales Process?</li> <li>• HOW efficient is your Credit &amp; Ops Process?</li> <li>• Quality of Proposals? Coaching Needs?</li> </ul>
<b>RETENTION / ADVOCACY</b>	<ul style="list-style-type: none"> <li>• HOW do you specifically retain customers?</li> <li>• HOW do you generate referrals?</li> <li>• Quality of CRM? Coaching Needs?</li> </ul>

## Monthly Sales PLAN Review

<p><b>P</b></p> <p><b>PERFORMANCE</b> Results vs Target Last Month / YTD</p>	
<p><b>L</b></p> <p><b>LEARNINGS</b> What worked? What didn't? Coaching Needs</p>	
<p><b>A</b></p> <p><b>ACTIVITIES</b> Specific Type &amp; Quantity Customers, Prospects, COIs</p>	
<p><b>N</b></p> <p><b>NUMBERS</b> Pipeline &amp; Probability Support Needs</p>	