Professional Center

PROFESSIONAL TRAINING COURSE

Course No. 1073

Sales Excellence for Retail Bankers

RETAIL BANKING & CUSTOMER EXPERIENCE
FINANCE, INVESTMENT & BANKING

DURATION
5 Days

DELIVERY
Classroom

LOCATION
Amsterdam, Netherlands

DATES
30 Nov – 4 Dec 2026

Scheduled Event Details

CITY	Amsterdam, Netherlands
DATE	30 Nov – 4 Dec 2026
DELIVERY TYPE	Classroom
COURSE FEE	€5,400

Course Overview

The Sales Excellence for Retail Bankers course is a comprehensive professional development program designed to enhance the sales capabilities of retail banking professionals while promoting customer-centric, ethical, and results-driven selling practices. In today's highly competitive banking environment, sustainable growth depends on the ability to understand customer needs, provide tailored financial solutions, and build long-term relationships that generate mutual value. This course equips participants with practical sales strategies, relationship management techniques, and performance improvement tools that support business growth and exceptional customer experiences.

Retail banking has evolved beyond transactional services to become a consultative profession where financial advisors and relationship managers are expected to deliver personalized solutions across deposits, loans, mortgages, cards, insurance, investments, and digital banking products. This program explores the complete retail banking sales cycle, from prospecting and customer profiling to needs analysis, solution presentation, objection handling, closing techniques, and post-sale relationship management. Participants will also learn how customer insights, data analytics, and CRM systems contribute to improved sales performance and customer retention.

The course emphasizes the integration of sales excellence with customer experience, regulatory compliance, and ethical banking practices. Participants will examine how effective communication, emotional intelligence, financial advisory skills, and value-based selling contribute to stronger customer trust while ensuring compliance with internal policies and regulatory requirements. The program also highlights the importance of balancing commercial objectives with responsible banking practices.

Through practical workshops, role-playing exercises, case studies, and real-life retail banking scenarios, participants will develop the confidence and competence required to achieve sales targets, strengthen customer loyalty, increase cross-selling and up-selling opportunities, and contribute to the long-term profitability and competitiveness of their financial institutions.

Objectives

- Analyze customer needs and financial goals to identify appropriate retail banking solutions by the end of the course.
- Develop consultative selling strategies that improve customer acquisition, retention, and relationship growth.
- Evaluate sales opportunities through customer segmentation, behavioral analysis, and financial profiling.
- Apply professional sales techniques to promote banking products and financial solutions effectively.
- Design customer-focused sales plans aligned with organizational objectives and business development targets.
- Improve communication, negotiation, and presentation skills to increase sales conversion rates during practical exercises.
- Strengthen relationship management capabilities to enhance customer loyalty and lifetime value.
- Implement CRM tools and customer data analysis techniques to support effective sales planning and follow-up.
- Assess retail banking sales performance using key performance indicators and measurable business outcomes.
- Align sales activities with regulatory requirements, ethical standards, and responsible banking practices throughout the program.

Who Should Attend

This course is designed for retail banking managers, branch managers, sales managers, relationship managers, personal banking managers, business development managers, customer service managers, regional managers, product managers, and executives responsible for sales performance, customer growth, and business development within financial institutions.

The program is equally valuable for personal bankers, financial advisors, customer relationship officers, branch sales officers, mortgage advisors, lending officers, credit sales specialists, wealth management associates, customer service representatives, CRM specialists, digital banking sales professionals, and employees responsible for promoting banking products and services to retail customers.

It is also highly relevant for commercial banks, Islamic banks, development banks, finance companies, government financial institutions, and organizations seeking to strengthen sales effectiveness, improve customer engagement, and build high-performing retail banking teams capable of delivering sustainable business results.

Learning Outcomes

- By the end of this course, participants will be able to:
- Identify customer financial needs and recommend suitable banking products and services.
- Apply consultative selling techniques throughout the retail banking sales process.
- Build trusted customer relationships that support long-term business growth.
- Conduct effective sales conversations using professional communication and questioning techniques.
- Increase cross-selling and up-selling opportunities while maintaining customer satisfaction.
- Handle customer objections and negotiate solutions with confidence and professionalism.
- Utilize CRM systems and customer insights to improve sales planning and follow-up activities.
- Measure and improve sales performance using relevant banking KPIs and performance metrics.
- Balance sales objectives with regulatory compliance and ethical banking standards.
- Develop and implement an actionable sales improvement plan for their retail banking environment.

Course Outline

DAY 01

Foundations of Sales Excellence in Retail Banking

- The evolving role of sales in modern retail banking
- Customer-centric sales strategies and value creation
- Understanding retail banking products and customer segments

DAY 01 — CONTINUED

- The retail banking sales cycle and customer journey

> **PRACTICAL APPLICATION**
> Customer profiling and identifying sales opportunities

DAY 02

Consultative Selling and Relationship Management

- Principles of consultative selling in financial services
- Conducting effective customer needs analysis
- Building trust, credibility, and long-term customer relationships
- Financial solution presentation techniques

> **PRACTICAL APPLICATION**
> Role-play exercises on consultative sales conversations

DAY 03

Advanced Sales Techniques and Customer Engagement

- Cross-selling and up-selling banking products effectively
- Managing customer objections and overcoming buying resistance
- Negotiation skills for retail banking professionals
- Closing sales while maintaining customer confidence

> **PRACTICAL APPLICATION**
> Sales simulations using real retail banking scenarios

DAY 04

Sales Performance, CRM, and Customer Experience

- Leveraging CRM systems to improve sales productivity
- Customer retention strategies and relationship development

DAY 04 — CONTINUED

- Measuring sales effectiveness through KPIs and performance dashboards
- Ethical selling, compliance, and responsible banking practices

PRACTICAL APPLICATION

Developing a personal sales performance improvement plan

DAY 05

Building High-Performance Retail Banking Sales Teams

- Strategic sales planning and execution
- Coaching, motivating, and developing sales professionals
- Integrating digital banking into retail sales strategies
- Continuous improvement and innovation in retail banking sales

FINAL WORKSHOP

Develop a comprehensive Sales Excellence for Retail Bankers action plan, including sales objectives, customer engagement strategies, performance metrics, implementation priorities, and continuous improvement initiatives aligned with organizational business goals.

Register or Request More Information

Course page: https://quest-training.com/courses/sales-excellence-for-retail-bankers
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