



Our research shows that eighty percent of customers don't turn to their RMs for the most pressing business needs.

Despite expectations that RMs are advising businesses on cash flow challenges, only 20% of decision makers seek an RM's advice, and only 5% of all decision makers are very satisfied with that advice.

We See a Better Way Forward

Marginal Return from Sales Investment
Illustrative



- Most business bankers are investing in tools and training to help RMs provide better advice to their clients.
- But customers tell us that they want basic financial help, and RMs know more about being a lender than running someone else's business.
- That's why the best banks invest heavily in credit management fluency and internal operational excellence not as a defensive tactic but as a growth strategy.

› Answers to Your Questions TODAY

“What changes do I need to make in the way RMs interact with customers in service interactions?”

Customer Experience Improvement Playbook—Understand the sales and service experience in customer terms and prioritize must-have improvements.

“How should bank management of the RM role change?”

Personal Workshop on Reinventing the RM Role—Identify best practices for converting the highly variable RM-controlled sales model into a consistent bank-controlled sales process.

“How can I help RMs identify when customers have a business need that the bank can meet through advice?”

“Quick Wins” Sales Playbook—Learn how to help your RMs sell to customers when they are ready to shop, based on the reasons they buy.

FUTURE Offerings

RM Role Benchmark

Identify the drivers of RM role success in sales and service interactions and how these drivers vary based on customer type and need.

Voice of the Customer Workshop

Learn what bank and RM attributes customers most value and how to generate latent customer demand.

Industry Specialization Case Studies

Pinpoint changes you should make in sales and service structures to maximize the return on sales investments.

Contact the Member Support Center for Assistance

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Not a member? E-mail EXBD_Support_FS@executiveboard.com to request information and contact a representative.