

“The Commercial Lending New Business Senior Sales & Marketing Workshop”

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WHO SHOULD ATTEND: **Commercial Loan & Business Development Officers**
Line Lenders • Select Credit & Branch Personnel
Other Business Lenders within the Organization

Realize significant commercial loan origination improvements through the strategies and tactics presented. Workshop highlights best practices in identifying, attracting, qualifying, soliciting and booking commercial loan opportunities. Enables continued development of a profitable, stable and risk diversified commercial portfolio. Teaches client retention and relationship techniques plus post-closing opportunities. Workshop addresses the development of new markets and rehabilitation of non-performing ones. Participants learn to increase market penetration / competitive intelligence while achieving both individual and budgeted departmental growth targets.

One-Day • Internally Presented • Tailored to Lender’s Objectives • Special Arrangements

Capitalizing on Your Competitive Environment

Who/What are You Selling Against
Sourcing Competitive Information
Identifying Competitor Relationships
Capitalizing on Competitor Strengths & Weaknesses
Succeed within the Highly Competitive Environment



Developing Effective Loan Origination Channels

Making the Numbers – The “Deal Wheel”
Historical, New & Direct Channels
Your *Action* Origination Channels
Leverage Existing Data / In-House Capabilities
Government, States & Municipals
Upgrade Market Visibility / Awareness
Maintaining Successful Intermediary Relationships



Strategic Planning / Implementation **(Includes New Territory Development & Rehabilitation)**

The Business Development Program
Tiering Prospects & Programs
Your Value Added Resources
Gain Immediate Market Awareness
Key City / Key Industry Programs
Your *Best* Advertising

The Prospect

Sourcing Prospect Information
Prioritizing Prospects
Prequalification
Developing the Prospect
Become the Industry Expert
Identifying Prospect Needs (Real or Perceived)



“Deal Winning” Techniques

The Loan Proposal as a Marketing Tool
Become Your Own Competitor
Managing the Credit & Approval Process
Relationship Preservation through Loan Closing
Leveraging the “Done Deal”



Hurdles

The Credit Committee
The Annual Review
Collateral Enhancements
Preserving the “Lost” Deal



Closing Comments

Host Lender

**Curriculum Exclusively Developed for Commercial Lenders by The Easton Group, LLC.
Presented by Kenneth P. Easton, Principal, 35+ years Commercial Lending, Sales & Marketing.**

**Request your free “Host Information and Benefits Schedule”: E-Mail: eastongroupllc@comcast.net
Visit our website: www.TheEastonGroupLLC.com**

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