



SAMPLE FIVE YEAR CONSULTING PLAN

Financial Supermarkets, Inc. is dedicated to helping in-store financial institutions succeed by providing pre-opening and ongoing consulting services. Your training consultant will discuss branch goals and expectations and assist the in-store leaders in customizing your consulting days each year.

Note: FSI suggests all new hires complete the Online Sales Training Course found in The Smart Cart.

1 YEAR ONE

Pre-Opening Workshop: "Executive Planning"
Pre-Opening Workshop: "In-Store Sales Training"
Post-Opening "On-Site Consultation": In-Store Business Development Coaching/ Follow-up and Analysis

2 YEAR TWO

One Hour Mystery Shop On-Site: "Benchmark Discovery Service"

Half Day "Strategic Planning Session" with Executive Team

Half Day "On-Site Consultation" with In-Store Team: Follow-up and Analysis; Review of Goals and Expectations; Work on Strengthening the Retail Partnership; Create a Business Development Plan; In-Store Business Development Coaching

3 YEAR THREE

Half Day Workshop: "Creating an Exceptional Customer/Member Service Experience" (In-Store and/or Traditional teams)

Half Day "On-Site Consultation": Work with In-Store Leaders to manage challenges: staffing, retail partners, motivation, business development, goal attainment, etc. Provide In-Store Business Development Coaching to In-Store Team.

4 YEAR FOUR

Half Day Workshop: "Creating Rapport to Increase Sales" (In-Store and Traditional teams)

Half Day "On-Site Consultation": Follow-up and Analysis - Assist the In-Store Team with creating business development activities and promotions to attract shoppers to the branch. Coach the team on creating rapport to educate customers/members as well as shoppers on various products and services offered.

OR

Two Half Day Workshops: "Creating Rapport to Increase Sales"

5 YEAR FIVE

Half or Full Day Workshop: "Managing the Sales Process: One Conversation at a Time" (In-Store and/or Traditional teams)

Half or Full Day Workshop: "Unleashing Leadership" (Anyone with supervisory responsibilities)
Time will vary - Evening Speaking Engagement with entire organization (Topic to be determined by Executive Team)

Refer to The Smart Cart for descriptions of pre-opening and ongoing consulting services offered.

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