



DURATION

eLearning 2 - 3 hours  
Classroom 2 days



DELIVERY CHANNEL

Blended



eLearning Course  
Lessons

- 1 Prepare Meeting Plan
- 2 Position Meeting
- 3 Engage Business Owner
- 4 Qualify Needs
- 5 Present Targeted Solutions
- 6 Gain Commitment to Advance
- 7 Complete Post-Meeting Report

Blended

## Collaborative Small Business Conversations

ENGAGING CONVERSATIONS THAT BUILD LONG-LASTING BANKING AND LENDING RELATIONSHIPS

### COURSE OVERVIEW & BENEFITS

In order to strengthen small business relationships, you must be able to present yourself as a knowledgeable and forthright financial partner, genuinely invested in both the owner's and the business's success.

Collaborative Small Business Conversations (CSBC) teaches bankers how to leverage their knowledge of business-related concepts to have effective and meaningful conversations with small business owners about their borrowing and cash management needs.

This blended learning solution begins with a short eLearning course that introduces the High-Impact Sales Process, a simple yet thorough framework for preparing for and conducting conversations that uncover a business's needs. It then explores each step of the process, providing participants with valuable tools that they'll be able to use on the job.

Upon successful completion of the eLearning course, participants are eligible to attend a two-day skills application lab. During this facilitated training event, they have an opportunity to apply what they've learned—and receive expert feedback—in a risk-free environment.

Each day culminates with a video-recorded skill practice that gives participants the opportunity to identify their strengths and those areas in which they have opportunities to improve.

### LEARNING OBJECTIVE

Learn how to prepare for and conduct astute, engaging conversations that demonstrate your ability to understand and uncover small business borrowing and cash management needs and meet them with well-crafted solutions.

### COMPETENCIES GAINED

**Participants will be able to:**

- Effectively prepare for a meeting with a business owner
- Engage business owners in ways that encourage them to reveal the business's needs
- Qualify needs by exploring the business's asset conversion cycle, financial performance and current banking relationships
- Present targeted solutions that demonstrate an understanding of the products and services that best meet the business's needs
- Gain the business owner's commitment to advance the transaction

### TARGET AUDIENCE

CSBC is suitable for anyone who interacts with small business owners, including business bankers, personal bankers, small business relationship managers and branch managers.

Contact us for more information at: [elearning@moodys.com](mailto:elearning@moodys.com)