

## Effective Referrals

**Course Description:** This course will provide participants with the skills needed to make confident and effective referrals. This course supports the Relationship Selling model used in the *Introduction to Relationship Selling* program.

**Audience:** The branch or operations personnel who initiate the needs assessment but are not involved in making or closing the sale. The audience may not see their roles as sales-related. They are generally involved in transactional and service interactions with customers.

**Objectives:** At the conclusion of the program participants will be able to:

- Describe what customers expect from their bank
- Identify sales and service referral opportunities
- Use benefit statements to make the referral
- Make the "hand off" to a specialist
- Identify follow up situations and develop appropriate techniques.

**Delivery Options:** This course can be delivered in the classroom and is also a [self-paced online course](#)

Note: Effective Referrals is printed on demand as ordered. The Participant's Handbook(s) and Trainers Guide may not be returned to ABA.

### **Participant's Handbook (c) 2007**

Catalog #3003822

\$57.75 List Price

**\$36.75 Member Discount**

### **Trainer's Guide**

Catalog #3003823

\$135 List Price

**\$95 Member Discount**

For more information about this product, please contact [Customer Service](#) .

---