

Prospecting Business Centers of Influence Worksheet

Copyright © MMXIV Cohen Brown Picture Co., Inc. This material embodies trade secrets and proprietary information. Any reproduction whether video, audio, written or otherwise and any disclosure, dissemination, or teaching of this material in any manner as well as any use or reuse of the content contained herein in any form without the prior written consent of the Cohen Brown Picture Co., Inc. or its licensee, Cohen Brown Management Group, Inc., is strictly prohibited. All rights reserved.

Who Are Your Centers of Influence (COI)?

1.		
2		
۷.		
3.		
1		
4.		
5.		
6		
0.		
7.		
8.		

What Do Centers of Influence (COI) Want from a Bank or Credit Union Professional Seeking Their Business?

What do your clients/members/prospects really want from their Business Banker?

1			
_			
2			
_			
3			
4			
5			
_			
6			
_			
7			
_			
8			
_			

Differentiation

To what degree am I consistently delivering on the Business Banker behaviors that my clients/members/prospects expect?



Review the list of desired Business Banker behaviors. Identify the one specific behavior that you believe—if you improved upon it—would better differentiate you and your organization from other Business Bankers in your market. (Note: Only include those critical behaviors that are within your control.)

Dit	Differentiate Your Offer, Your Organization, and Yourself		
	Use the Differentiation Rap Use Indirect Bad-Mouthing ("Unlike other organizations")		
_			
_			
_			
_			
_			
_			
_			
_			
_			
_			

Identify Your Client/Member

Let's narrow down who your target clients/members are according to a few questions you can ask yourself.

1.	What has been your (you as the business banker) most recent success?
2.	Look at your most successful client(s)/member(s). What do these clients/members have in common? What are their characteristics?
	■ Geographic location
	 Type of customers they service
	■ Type of business
	Small business owner or corporation
	 Asset size
	One location or multiple locations
	 Number of employees

Identify Your Client/Member (cont'd.)

3.	Create the profile of your target prospects.
4.	Is there a new market segment you should target (for example, due to economic or demographic changes)?
_	

Offer to Assist Script

Is there anyone you know who would benefit from the services I offer?	