

TRANSFORMSALES.AI



Microsoft

Accelerating Revenue Generation

in Banking

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WELCOME



Mark Swain

Payments sales experience AMEX (10 yrs)
Banking sales experience with ANZ (10 yrs)
Banking Sales trainer (6 yrs)



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Business Applications Strategist Microsoft (4 yrs)
Technology Consulting EY (3 yrs)
ERP/CRM Implementation Tectura (4 yrs)

Agenda

Accelerating Revenue Generation in Banking

01. The current sales challenge
02. Navigating today's sales environment
03. How technology can accelerate sales productivity

Industry Challenges

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**THE JOB OF SALES IS
BECOMING HARDER
WHETHER ITS RETAIL OR
COMMERCIAL BANKING.**

- More people involved in decision making.
- Client research takes time.
- Multiple systems and sources of information navigated.
- People are harder to contact.
- Sales administration takes time away from selling.
- Buyers often contact sellers much later in the sales process.
- Difficulty getting single view of customer.
- Old product focused sales approaches don't work anymore.
- Sales environment has changed radically post Covid.
- Opening is the hard part now, it used to be the closing.



How can sellers
navigate the current
environment?

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Sales Transformation for Corporate Business

1. Target the right clients



3. Approach with value



5. Summarize the client vision



7. Obtain the yes



9. Manage for growth & referrals



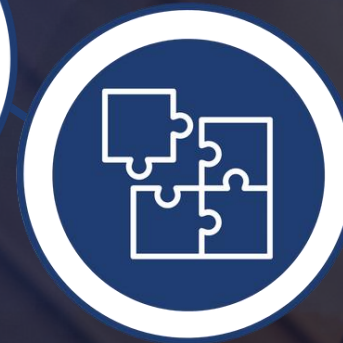
2. Research the industry



4. Conduct a needs analysis



6. Finalize the pitch



8. Realize the revenues



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Where TRANSFORM
Sales.AI can
support the sales
process?

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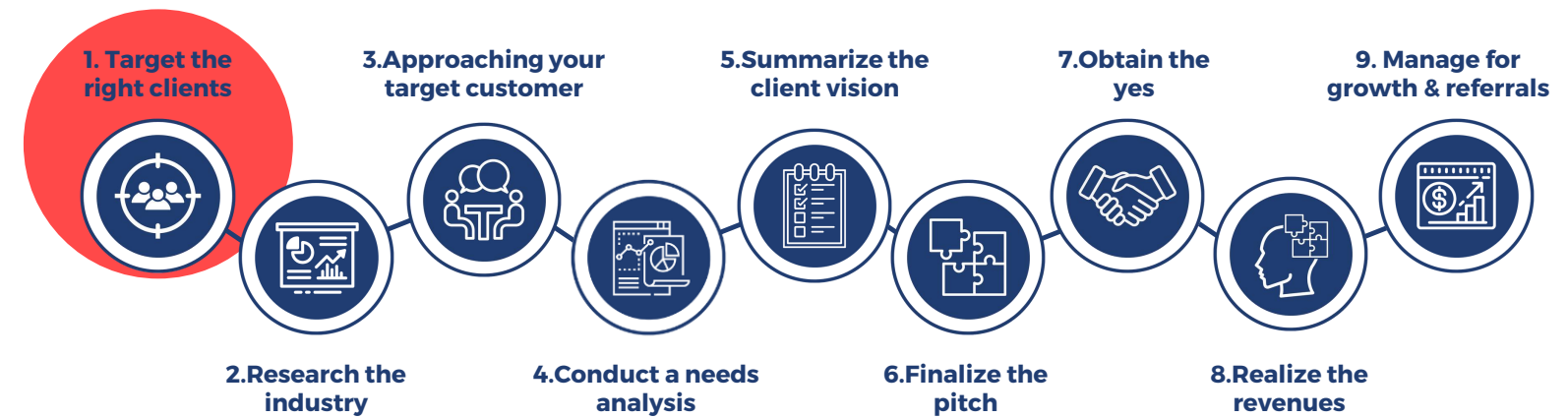
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1. Target the right clients

Automatically generate a list of ideal clients to target.





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2. Research the industry

Generate deep insights into target clients.





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3. Approach with value

Personalised and targeted messaging for each client opportunity.

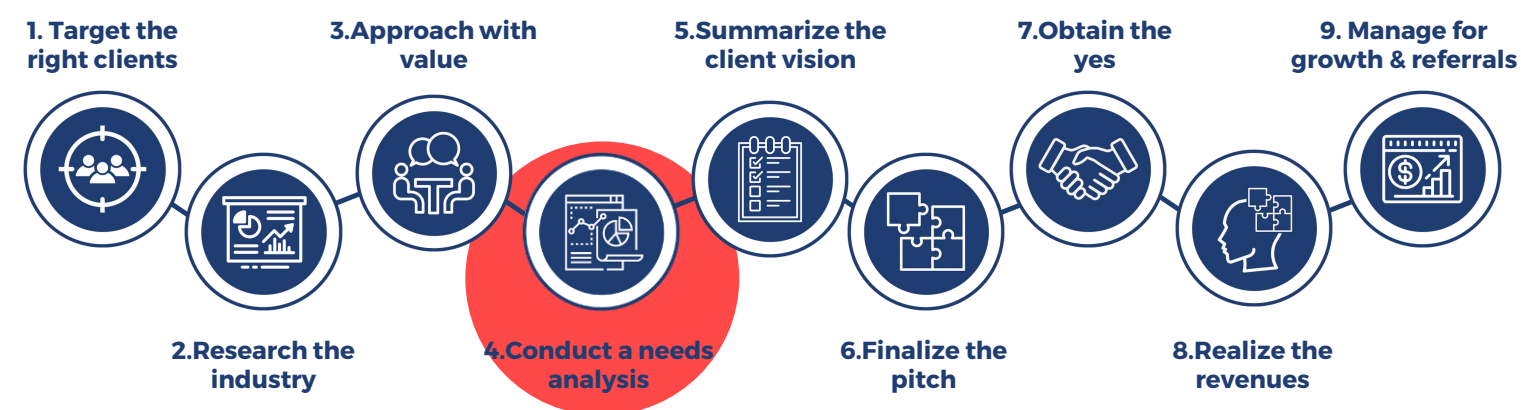
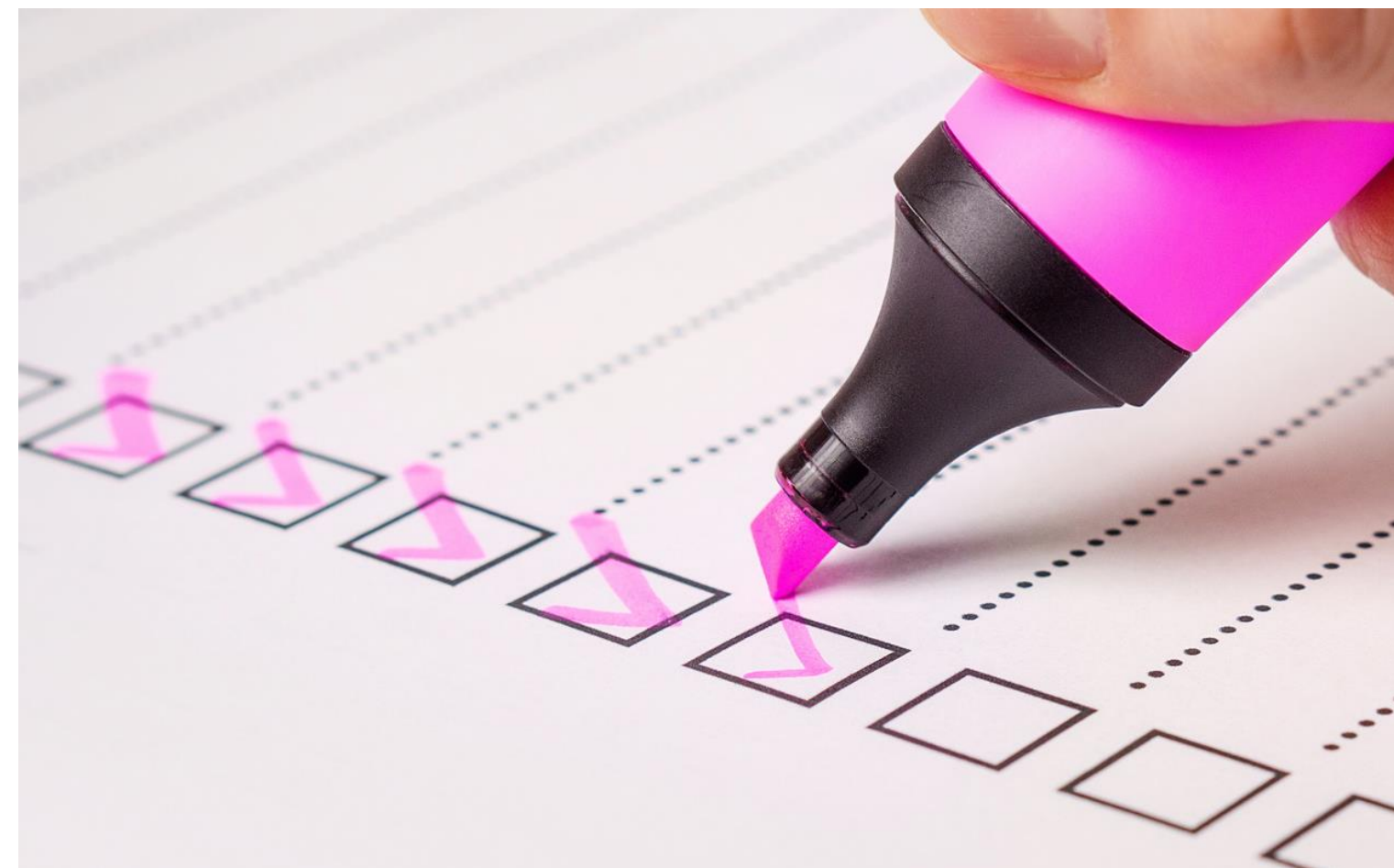




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4. Conduct a needs analysis

Get presented with the best questions to ask to understand the client's real needs.

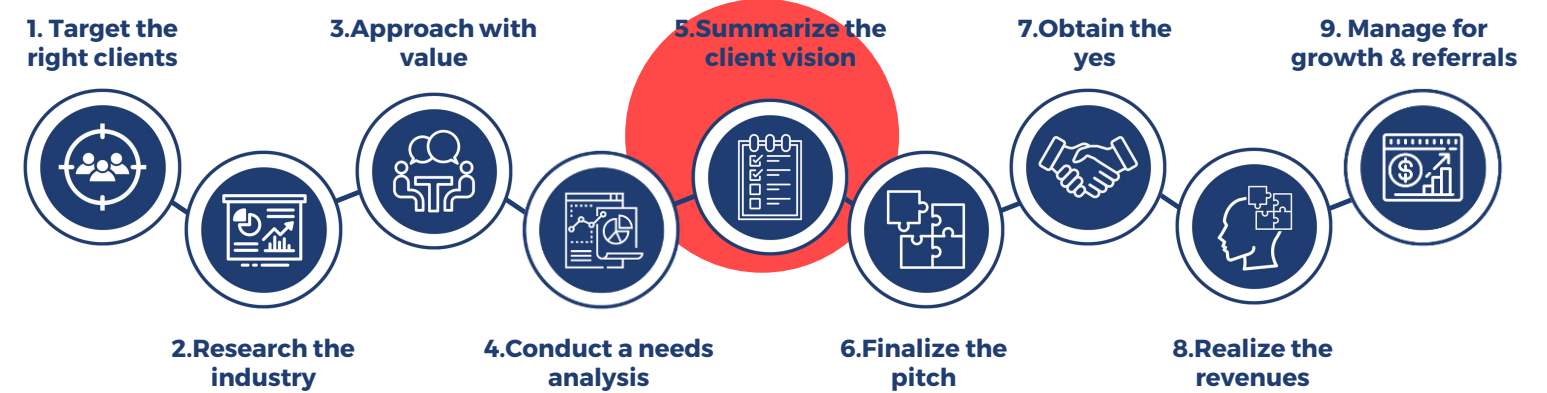




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5. Summarize the client vision

Automatically summarize the critical deal elements to secure deal success.

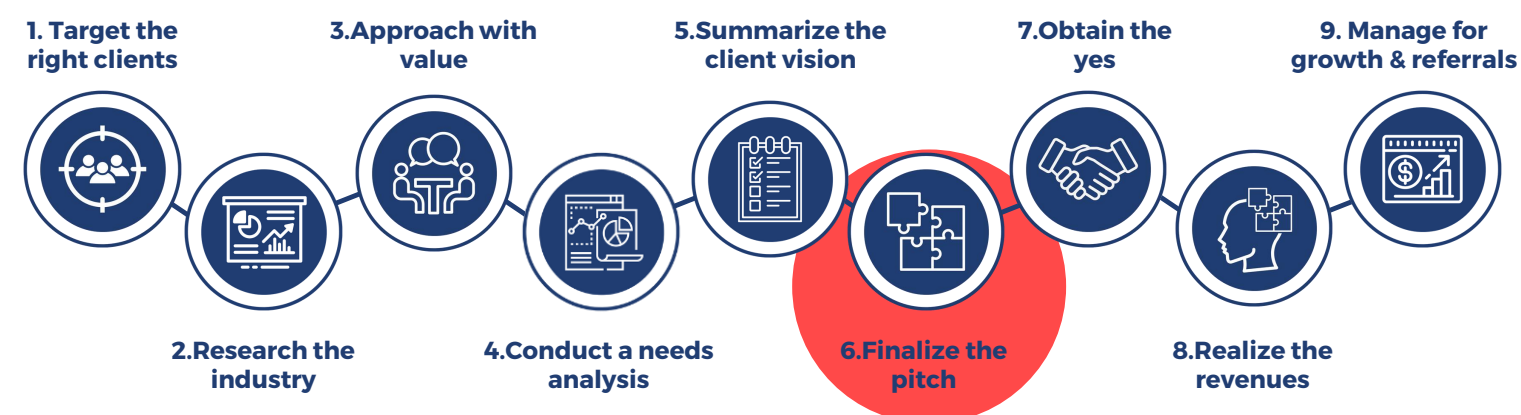




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6. Finalize compelling pitch

Auto-generate a compelling three stage pitch draft based on customer pain points.





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7. Obtain the yes

Pricing and T&C concessions recommended based on comparable clients.





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8. Realize the revenues

Onboard revenues promptly with smart implementation nudges.





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9. Manage for growth & referrals

Automatically populate Strategic Account Plans with clear cross-sell next steps.



Where
technology is
helping sellers

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Technology & Sales working together

DEMONSTRATION



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“Insanity is doing the same thing over and over again and expecting different results”

Albert Einstein

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- Explore how sales can blend with technology to make your salesforce more efficient.
- Start with some small wins such as meeting translation and content creation.
- Review your current sales process and assess where it can be improved.
- Talk to your salesforce and ask them where they need the most help.
- The world of sales has changed post Covid and is about to change even more.
- Contact us to discuss embracing the power of technology and humans working together to achieve revenue acceleration and sales productivity in banking and financial services.
- Try out our TRANSFORMSales.AI tool to see how it works for you.



Thank you

Test out TRANSFORMSales.AI by clicking on our TRANSFORMSales.AI engine at the top of this web page.

Contact us at mark@markswain.com.au to discuss how you can leverage AI Sales to grow your business.

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