

BANK REFERRAL TRAINING

Bank Referral Training Program

Objective

Empower all branch employees to turn every merchant interaction into an opportunity to uncover and meet the merchant's payment processing needs.

Strategy

Leverage digital communications and bank staff training at each branch to increase merchant services visibility, understanding and prospect engagement.



▪ Goals/Outcomes

- Increase branch participation
- Increase number of qualified referrals (1+ incremental referral per branch per month)
- Grow net new revenue

Referral Training Program Components

Kickoff

Bank management communicates the importance of merchant services and overview of Referral Training Program.

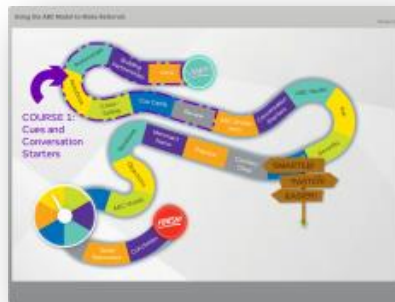


Email / Letter



Training

Bank staff completes online training to gain confidence in making more qualified referrals.

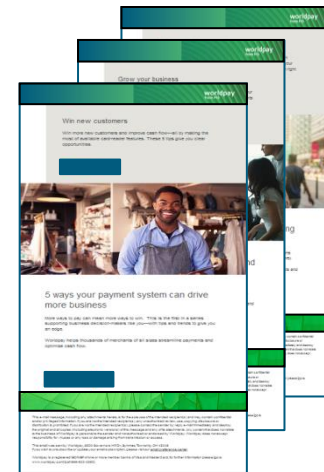


Online eLearning



Reinforcement: Emails

Emails are sent to bank staff 2x per month with link to additional resources.



Email Series

Referral Training Program Components

Reinforcement: Huddles

AE conducts follow-up and ongoing quarterly huddles and coaching to reinforce training.



Huddle Facilitator Guides



Reinforcement: Reporting and Tracking

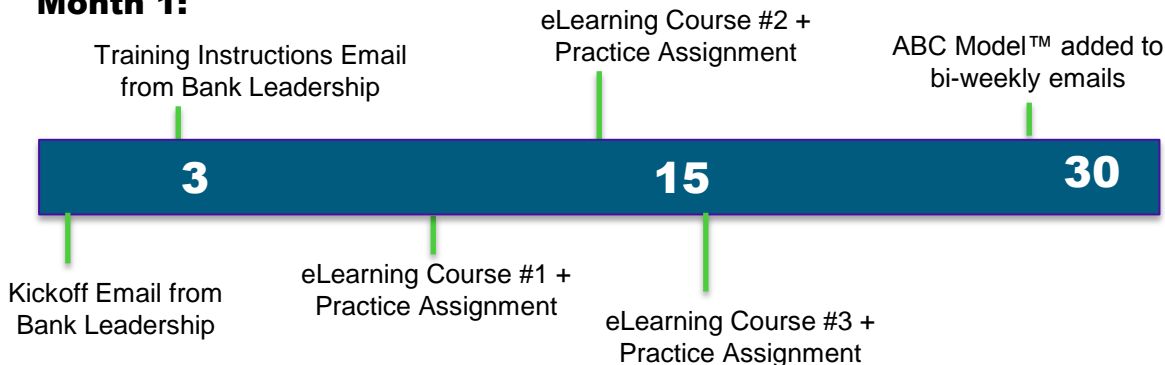
Worldpay tracks and reports training completion, email stats, qualified referrals, and close rates by banker and branch.



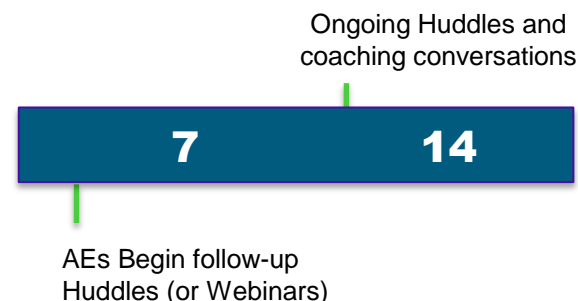
Referral / Closed Deal Reports

Bank Referral Training Program Timeline

Month 1:



Month 2:



Key Touch points and support

Tactic	Description
Kickoff email	Email sent from bank leadership to bank staff; Message: Importance and value of merchant services, Information about goals, timing, ongoing emails, huddles and expectations of bank staff.
Training	Email sent from bank leadership to bank staff: link to eLearning courses for training and practice assignments.
Follow-up Huddles	AE-led follow-up meetings to reinforce and drive engagement around the ABC Model training + AE Scenario Planners to guide individual conversations with bank staff; Note: Delivered via webinar for ISG branches
Ongoing Bi-weekly Emails	Message: ABC Model reinforcement. Tips and Talking Points, Additional Resources. Payments Industry Thought Leadership.
Ongoing Huddles and Coaching Conversations	Message: ABC Model reinforcement. Tips and Talking Points. Additional Resources. Payments Industry Thought Leadership. Interactive conversations around what's working, what's not working, what's next. Note: Delivered via webinar for ISG branches
Reporting and Tracking	Reporting on results – banker training completion, banker/branch engagement, qualified referrals against goals and post-training trends.

Initial Pilot Results/Learnings

- **18 branches / ~145 bank staff / 86% completion of all 3 eLearning courses**
- **AE Comments:**
 - “Response was great! I got six referrals after the follow-up huddle.”
 - “My branch loved covering the ABC Model™ in our second huddle!”
 - “Overall, the training was well-received”
 - “Branch managers are happy to have us in their branches delivering these huddles.”
- **Bank Staff Survey Comments:**
 - “The interactive learning was wonderful.”
 - “It was very helpful in approaching customer in numerous ways.”
- **Overall Impact:**
 - “Our branch has produced the most Worldpay referrals in our area.”
 - “Our drive up teller submitted referrals.”
- **Follow-up Huddles:**
 - “We were able to practice and recall the information that was provided in the modules with better ease and comfort.”

NEXT STEPS FOR BANK PARTNER

What's Next?

- **Talk to your PPM about logistics and timing**
- **Request access to test/review the eLearning**
 - First/last name
 - Bank Name
 - Email Address
- **Schedule rollout and follow the subsequent steps**

Step 1

- eLearning Access
- Provide the following contact information for all bank staff for (1) eLearning platform access and (2) bi-weekly reinforcement emails:
 - Name
 - Email
 - Title
 - Division
 - Branch
 - Manager Name
 - Manager Email

Step 2

- Kickoff emails from senior bank leadership
 - Review, edit and send introductory email to all bank staff
 - Review, edit and send training instructions email to all bank staff

Step 3

- Follow up with branch managers to confirm training engagement
 - Has everyone received the training instructions email?
 - Is all staff starting training?
 - Is everyone on track to meet the deadline?

Step 4

- Ongoing Reinforcement
- Branch Managers work with AEs to schedule ongoing huddles
- Branch Managers and AEs review weekly or monthly reporting

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