

## Artificial Intelligence

### **Advisory & Design Services**

In today's competitive banking environment, leveraging AI to enhance sales performance is no longer optional – it is essential. Our engagement programs are designed to share AI best practices and equip banking teams with the tools to implement AI-powered discovery calls, strengthen sales coaching, and improve client engagement.



## **Banking Knowledge & Experience**

Performance Insights' consultants bring over 25 years of experience in banking and banking sales improvement. We help banks integrate AI into their CRM and sales processes to increase sales performance – shorter sales cycle, higher sales velocity, improved conversion rates.

## **Using AI To Remove The Obstacles To Performance Improvement**

Performance Insights' AI objectives are focused on removing the critical obstacles related to sales productivity - the efficiency and effectiveness with which a salesperson or sales team converts time, effort, and resources into revenue-generating activities.



## AI Innovations for Commercial Banking Sales & Marketing.

- ✓ **Custom Engagement Programs** for Sales, Marketing & IT
- ✓ **Exclusive AI Strategy Sessions & Workshops** for banking sales leaders
- ✓ The **'Banking AI Innovation Playbook'** that outlines AI's role and best practices in prospecting, sales call planning, customer relationship management, marketing lead campaigns, discovering needs, sales coaching, and performance management.
- ✓ **A 3-Month AI Sales Acceleration Pilot** with measured improvements.



## Core Value Proposition

- **AI-Driven Sales Acceleration:** We help commercial banks leverage AI to improve sales productivity and drive measurable performance improvement.
- **Performance-Based Innovation:** Our approach goes beyond theory; we implement AI solutions that deliver measurable results.
- **Real-Time Sales Enablement:** AI enhanced processes, predictive insights, AI-enabled coaching to improve sales effectiveness and productivity.

## Key Differentiators

- **Measurable ROI:** We focus on quantifiable results such as improved win rates, shorter sales cycles, and increased revenue per salesperson.
- **AI-Enabled Best Practices:** We integrate AI with existing CRM and sales processes to enhance, not replace, relationship management.
- **Bank Specific AI Expertise:** Unlike generic AI consulting firms, we specialize in commercial, business, treasury, SBA, and retail small business banking sales teams.





## Please Contact Us

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**Your first workshop is free.** We will share the AI best practices we have learned with our other AI engagements and provide you with:

- ✓ An AI Readiness Assessment
- ✓ Prioritized AI Design Ideas With Deployment Plans
- ✓ Shared AI Best Practices
- ✓ Hands-On Sales & Coaching Experiences With AI

