

FOR: Bank Sales Teams

9 Ways Your Administrative Assistant Supports Sales

Is your Administrative Assistant helping you focus on business development? Behind every successful banker there is a talented AA (or, in the case of some extremely successful bankers, more than one!).

Whether you're lucky enough to have a great assistant all to yourself or whether you're sharing one, here are some ways that an AA can support your sales efforts:

1. **Resolving routine customer service inquiries:** If you don't have to get involved in the often time-consuming details of missing deposits, errant wire transfers, and other common problems, you're very fortunate. The same goes for processing check orders, loan payments and money transfers.
2. **Following up with customers** to make sure everything has been taken care of in a satisfactory manner (e.g. Did the checks you ordered arrive? How do you like the enhancements to Internet Banking?)
3. **Handling all sales reports** (and keeping you out of trouble with your sales manager): After a quick conversation with you, your AA should be able to keep the weekly pipeline updated, as well as any other standard reports.
4. **Maintaining your calendar:** Some bankers I know also involve their AA in scheduling appointments with customers and selectively with prospects.
5. **Acting as your liaison** with credit administration and loan processing units on the many details related to your portfolio. (Note: This obviously requires a familiarity with your loan process that only comes with training, coaching and experience.)
6. **Keeping you apprised** daily of any significant changes in account activity (e.g. overdrafts, balance fluctuations, etc.).
7. **Preparing folders** on customers and prospects that could include industry research, information from websites, newspaper clippings, etc.
8. **Reviewing customer accounts** for additional sales opportunities (e.g. Do we have the business customer's personal accounts? Are they taking advantage of the latest cash management products? Would it make sense to introduce our Wealth Management team to them?).
9. **Preparing proposals**, sending out marketing materials and keeping your name in front of your key contacts via mailers of all sorts.

One final thought: If you're not blocking out time on a weekly basis to talk one-on-one with your AA about your business development activities, you should. Your success quite literally depends upon it.

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