JUPITER PRIME
Consulting • Training • Advisory
جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Retail Branch Sales Planning and Pipeline Coaching Training Course

29 March – 2 April 2027
Munich

Retail Branch Sales Planning and Pipeline Coaching Training Course

Ref: 2345_87737 **Date:** 29 March – 2 April 2027 **Location:** Munich **Fees:** 5600 GBP

Retail Branch Sales Planning and Pipeline Coaching is a 1-week training course for retail branch, sales and area managers who turn bank targets into a branch sales plan their advisers can act on. Customers now compare banks on their phones before they walk in, so the branch conversation must be prepared, segmented and conduct-safe to win the account. Jupiter Prime Training offers this course on Retail Branch Sales Planning and Pipeline Coaching.

Why Retail Branch Sales Planning and Pipeline Coaching Matters Now

Three forces reshape branch selling: digital channels absorb routine transactions, so branch time shifts to advice on mortgages, savings and cards; conduct expectations make mis-selling costly in complaints, refunds and reputation; and leaders want sales forecasts they can trust. A branch that segments its book, coaches its pipeline weekly and pays for quality grows primary relationships. A branch that chases product counts burns customer trust and adviser morale. The course rests on customer lifetime value, the sales funnel and the principle of fair customer treatment, each explained in general terms.

Who Gains Most from Retail Branch Sales Planning and Pipeline Coaching

- Managers who set branch targets and allocate them across advisers and products
- Area leaders who compare branches and decide where coaching time goes
- Sales managers who run daily huddles and weekly pipeline meetings
- Staff who design scorecards and incentive rules for branch roles
- Quality and conduct officers who test sales files for suitability

A bank gains most when an area leader attends with two or three of the branch managers who report to them.

Retail Branch Sales Planning and Pipeline Coaching Capabilities

Participants leave able to link each adviser's daily customer conversations to the branch's quarterly numbers.

- Segment the branch customer book by value, life stage and product holding — target allocation
- Build a branch sales plan with activity, conversion and product mix targets — area leadership
- Coach advisers through pipeline stages using recorded conversation evidence — branch managers
- Design balanced scorecards that reward quality as well as volume — incentive committee
- Test sales files for suitability and disclosure before sign-off — conduct oversight
- Forecast monthly branch sales from pipeline value and conversion rates — finance partners

Key Retail Branch Sales Planning and Pipeline Coaching Terms

- Sales pipeline — the set of open customer opportunities, grouped by stage, from first need to signed product.
- Conversion rate — the share of opportunities at one stage that move to the next or close as sales.
- Customer lifetime value — the expected income from a customer relationship over its whole duration, less the cost to serve.
- Share of wallet — the part of a customer's total banking needs that the bank currently serves.
- Balanced scorecard — a set of weighted measures covering sales, quality, service and conduct for each role.
- Suitability check — a test that the product sold matches the customer's needs, means and understanding.

Retail Branch Sales Planning and Pipeline Coaching Day by Day

Day 1: The Branch in a Multichannel Market

- Branch Role Mapping — Advice Versus Transaction Time Allocation
- Catchment Analysis — Local Demand For Mortgages, Cards And Savings
- Customer Journey Mapping — Where Digital Hands Over To Branches
- Competitor Offer Scan — Positioning Branch Products Against Rivals
- Branch Target Cascade — From Regional Numbers To Adviser Goals

Day 2: Segmentation and Opportunity Building

- Value And Life-Stage Segmentation — Prioritising Customers For Contact
- Product Gap Analysis — Raising Share Of Wallet Responsibly
- Lead Generation Campaigns — Using Triggers Such As Salary Changes
- Referral Routes From Tellers — Passing Needs To Advisers
- Appointment Planning Grid — Matching Adviser Diaries To Segments

Day 3: Pipeline Coaching

- Pipeline Stage Definitions — Consistent Entry And Exit Criteria
- Weekly Pipeline Meeting Format — Spotting Stalled Opportunities Early
- Observed Conversation Coaching — Needs Discovery And Objection Handling
- Daily Huddle Routine — Activity Focus Without Pressure Selling
- Conversion Rate Diagnostics — Locating Leaks Between Pipeline Stages

Day 4: Incentives and Conduct-Safe Selling

- Scorecard Weighting Design — Balancing Volume, Quality And Service
- Incentive Gates And Clawbacks — Discouraging Mis-Selling Behaviour
- Suitability And Disclosure Checks — Signing Off Sales Files
- Complaint And Cancellation Analysis — Early Warnings Of Poor Practice
- Vulnerable Customer Handling — Adjusting The Sales Conversation

Day 5: Practising the Branch Sales Plan

- Segment Target Sheet — Applying Segmentation To Adviser Goals
- Pipeline Forecast Model — Applying Conversion Rates To Monthly Sales
- Coaching Calendar — Applying Observed Conversations And Huddles
- Scorecard Pilot Proposal — Presenting Incentive Changes To Leaders
- Branch Sales Plan — Combining Targets, Pipeline, Coaching And Conduct

Applying Retail Branch Sales Planning and Pipeline Coaching After the Course

- Run a stage-by-stage pipeline meeting with advisers and record conversion rates for each product line.
- Observe three adviser conversations and give structured coaching on needs discovery and suitability.

Retail Branch Sales Planning and Pipeline Coaching Questions FAQ

What is retail branch sales planning and pipeline coaching, and why does it matter now?

It is the way branch leaders set sales goals, build opportunities and coach advisers through each stage. It matters now because branches handle fewer transactions and more advice, so every customer conversation must count and stay fair.

Which roles gain most from retail branch sales planning and pipeline coaching?

Branch, area and sales managers gain most, along with staff who design scorecards. You benefit most if you set targets, run pipeline meetings or coach advisers.

How does retail branch sales planning and pipeline coaching differ from a general sales management course?

A general sales management course covers selling across industries. This subject focuses on bank branches: customer segments, mortgages and cards, teller referrals, suitability checks and incentive rules that protect customers.

What do you bring back from retail branch sales planning and pipeline coaching?

You bring back a branch sales plan. It links segment targets, a pipeline forecast, a coaching calendar and a scorecard proposal that you can present to your area leader.

Retail Branch Sales Planning and Pipeline Coaching: The Way Forward

The branch sales plan first informs how targets are split across advisers and customer segments. Branch managers use it in weekly pipeline meetings, and area leaders use it to compare branches. After its first quarter, revisit the conversion rates and complaint signals to see whether incentive weightings are rewarding the right conversations.