**Session 3 – Leading Teams, Causing Results**

**Case Study #1**

Sam is a top-notch performer. You always count on Sam to deliver and then some. Sam is a great prospector and wonderful closer, but you believe that he may be missing some opportunities with current customers. When you asked Sam about this earlier in the month he responded, “We have the total relationship.” When you make calls with Sam you have noticed how bold he is with prospects and will ask for the business every time. What you also have noticed is that he does not go for the whole relationship but rather closes the business that inspired the call. You believe that he could close even more business and have more of the customers’ accounts if he was willing to inquire more when he closes a loan or opens an account.

You have scheduled a meeting with Sam to discuss this. What are the facts? What will you say? What will you do to assess Sam’s capability? What will you do to assess Sam’s commitment? How will you make certain that Sam does most of the talking/new thinking during the discussion?

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**Case Study #2**

Amy has been with your bank for 5 years. She is the best employee on your team. You count on her to deliver and to exceed her goals. In the past, Amy has been reluctant to take on a leadership role. You really need to build the strength of your leadership team and think that Amy is the right fit right now. You have not spoken with Amy since last year about taking on a leadership role, so you have scheduled a meeting with her next week to do so.

You have scheduled a meeting with Amy to discuss the possibility of taking on a leadership and management role in the bank. What are the facts? What will you say? What will you do to assess Amy’s capability? What will you do to assess Amy’s commitment? How will you make certain that Amy does most of the talking/new thinking during the discussion?