

# 3 Proven Ways to Increase Bank Branch Sales

Are your branches properly staffed to meet your sales and new customer acquisition goals?

In the fast-evolving landscape of banking, ensuring optimal branch performance is crucial for driving sales and enhancing customer satisfaction. While digital banking channels have seen significant growth, physical branches remain pivotal in delivering personalized service and fostering deeper customer relationships.

To maximize the full revenue-generating potential of branches, three proven strategies can be leveraged:

- Properly staff branches for sales growth.
- Allocate your bankers' time wisely.
- Provide customers with more convenient ways of interacting.

## 1. Properly staff your branches for sales growth

Staffing for sales growth requires more complex calculations and parameters than Excel spreadsheets and home-grown solutions can typically handle.

An accurate forecast is the primary building block to proper workforce planning. The forecast must account for historical trends, future customer arrivals, and market trends in order to project the efforts needed to achieve a specific sales target branch by branch. The forecast must factor every type of interaction being planned, as each type of sales and service interaction requires a different amount of time to complete.

Calculating the projected workload must also include capacity for meeting sales goals. Staffing models need to incorporate time for revenue-generating activities, such as business development and outbound calls. Understanding the staffing investment required to obtain sales goals helps to establish the correct roles and the proper playbooks for each branch to effectively engage with customers and prospects.

## 2. Schedule your bankers' time wisely

Once you have determined the proper staffing, you then need to ensure bankers are deployed in the right locations, at the right time, and performing the right tasks. Manual scheduling processes are prone to errors, missed sales opportunities, and inefficiency, impacting both employee productivity and customer service quality. Automated scheduling systems streamline workforce management by helping to ensure that branch personnel are able to capitalize on sales opportunities while maintaining service excellence by:

- **Matching banker shifts to customer arrivals.** Align banker schedules to forecasted customer demand for each branch to maximize customer engagement and revenue generation.
- **Scheduling specific blocks of time for proactive, revenue-generating activities.** Automatically schedule dedicated time for outbound calling, business development, or networking activities to leverage time between walk-in customer arrivals and scheduled appointments.
- **Ensuring bankers are executing on the right behaviors.** Provide visibility to branch managers and market, region and branch network leaders on when and how much time is being scheduled for revenue-generating activities relative to expectations. Having dedicated, scheduled time provides bankers with the needed focus to properly execute and complete required sales activities.

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# Executive Perspective

## 3. Drive more customer meetings with bankers.

Promote convenience to customers and prospects and empower them to schedule meetings in advance with specific bankers based upon their financial needs.

- **Leverage digital appointment booking.** Emphasize that you offer appointment booking on your financial institution's website to better promote convenience, attract prospects, and engage customers. Verint® branch field studies found that appointments have a 20% to 25% higher sales conversion rate than meetings from walk-in customers. And 33% of consumers who had used a digital appointment booking service said the ability to book an appointment online made them more likely to visit the branch in the first place.
- **Provide different types of appointments.** A meeting with a banker doesn't always have to be face to face. Give customers the option of booking an in-branch, phone, or video appointment with a banker to allow them to engage in a manner and time that is most convenient for them. In one study, 30% of consumers indicated they were looking for video banking appointments.
- **Drive more personalized service.** Digital appointment booking gives financial institutions an opportunity to ask questions about the customer's financial goals or the outcomes the customer would like to see from the visit. This information helps bankers prepare in advance for customer interactions and provides more personalized experiences to drive sales, enhance service, and build deeper customer relationships.

Financial institutions need to fully leverage their branches to ensure sustained success in the competitive landscape of the banking industry. By properly staffing for projected sales growth, aligning staff schedules to customer demand and sales efforts, and empowering customers with digital appointment booking, banks can realize the full revenue-generating potential of their bank branches.

Leading banks and credit unions have partnered with Verint branch workforce engagement experts on branch field studies, position planning, strategic staffing, open hours optimization, and other [branch consulting services](#). [Verint Workforce Management Branch Forecaster™](#) and [Verint Workforce Management Branch Scheduler™](#) solutions are used to staff and schedule over 40,000 branches worldwide. [Verint Appointment Booking™](#) and [Verint Queue Management™](#) solutions have served over 1.77 million financial institution customers. To learn more, visit [www.verint.com/branch](http://www.verint.com/branch).

- (1) Verint Branch Bank Benchmark Report
- (2) Supercharge Your Bank Branches: Maximize Appointment Booking, Verint, 2023
- (3) 3 Ways Brick-and-Mortar Retailers Can Improve CX, Verint, 2024



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