
Bank Sales Performance Management Course: Funnel Control, Incentives and Conduct

31 May – 4 June 2027
New York





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Ref: 671_33307 **Date:** 31 May – 4 June 2027 **Location:** New York **Fees:** 7900 GBP

Programme Summary

Bank sales performance management is the subject of this one-week training course for heads of retail banking, branch network leaders and sales directors, ending in a sales performance plan for one retail business line. Retail banks set sales targets, yet often lack a shared view of pipeline quality, incentive effects and sales conduct. The programme moves from diagnosis to target setting, funnel control, incentive design, coaching and conduct safeguards, using cases from branch, digital and relationship channels. Mars Training Centre UK delivers this programme on bank sales performance management to mixed-organisation cohorts.

The Business Case

Sales results in a retail bank depend on many small decisions made by branch managers, relationship officers and product teams. Without common measures, leaders see volumes but not pipeline quality, incentive cost or the conduct risk that aggressive targets can create. A shared method gives senior teams a basis to set realistic targets, direct coaching and judge branches fairly.

- Sales Productivity: Improves as pipeline stages and conversion points are measured and managed by leaders.
- Customer Outcomes: Improve as targets and incentives are tested against suitability and retention.
- Conduct Risk: Falls as sales pressure is checked against agreed conduct safeguards.

Principles and Evidence Base

- Sales Funnel Principles: Break the path from lead to sale into measurable stages, applied in Sessions 2 and 3.
- Incentive Design Principles: Link reward to results that serve both the bank and the customer, applied in Session 3.
- Coaching Cadence Principles: Turn performance data into regular, observed feedback for sales teams, applied in Session 4.
- Conduct Safeguard Principles: Place checks on selling practice where pressure is highest, applied in Sessions 4 and 5.

Intended Participants

- Heads of retail banking who set sales ambitions and allocate targets across regions and channels.
- Branch network leaders who convert targets into plans, coaching routines and weekly reviews.
- Sales directors who own pipeline reporting, incentive schemes and sales team capacity.
- Product, risk and finance partners who test whether sales plans are affordable and suitable for customers.



Typical functions include retail banks, digital banks and insurers selling through branches.

Learning Outcomes

1. Participants will be able to diagnose the drivers of sales results across branch, digital and relationship channels.
2. Participants will be able to construct target sets that reflect customer segments, capacity and market potential.
3. Participants will be able to evaluate pipeline stages and conversion points to locate where sales are lost.
4. Participants will be able to justify an incentive scheme by testing its effect on behaviour and cost.
5. Participants will be able to prioritise coaching actions for sales teams from observed performance data.
6. Participants will be able to assess sales practice against conduct safeguards and propose corrective controls.

Programme Structure

Day 1: Bank Sales Performance Diagnosis

What explains the sales results a retail bank is producing today?

- Sales Result Driver Tree
- Customer Segment Contribution Map
- Channel Mix Comparison
- Branch Performance Spread Analysis
- Sales Performance Diagnostic Sheet

Day 2: Targets, Capacity and Planning

How are targets set so that they are achievable and fairly shared?

- Market Potential Estimate
- Target Cascade Model
- Sales Capacity and Time Allocation Review
- Product Priority Matrix
- Sales Plan Template

Day 3: Funnel Control and Incentive Design

Where in the pipeline are sales lost, and what do incentives encourage?



- Pipeline Stage Definition Sheet
- Conversion Point Analysis
- Lead Quality and Referral Tracking
- Incentive Scheme Option Comparison
- Incentive Cost and Behaviour Test

Day 4: Coaching and Conduct Safeguards

How does a leader improve selling practice without raising conduct risk?

- Sales Coaching Observation Guide
- Weekly Performance Review Routine
- Suitability Check at Point of Sale
- Complaint and Mis-Selling Signal Review
- Conduct Safeguard Control Table

Day 5: Sales Performance Plan for One Business Line

Do the targets, pipeline measures, incentives and safeguards support one workable plan?

- Applying the Session 1 Sales Performance Diagnostic Sheet
- Testing the Session 2 Target Cascade Model
- Reviewing the Session 3 Incentive Cost and Behaviour Test
- Checking the Session 4 Conduct Safeguard Control Table
- Completing the Retail Sales Performance Plan

Methodology

The programme uses a data workshop method built on a shared case of a retail bank with several branches, a digital channel and a relationship team. Participants build each work product from prepared sales and pipeline data, then adapt it to their own business line.

- Suggested activity: Tracing lost sales through a pipeline for one branch group.
- Suggested activity: Comparing two incentive schemes by cost and likely behaviour.
- Suggested activity: Practising a coaching conversation from an observation sheet.

Capstone Output

Each participant completes a retail sales performance plan for one business line. It holds a diagnostic sheet, a target cascade, a pipeline measure set, an incentive option test and a conduct safeguard table. The plan is used at work to brief regional managers, agree targets with senior management and set the weekly review routine.



Frequently Asked Questions

Is bank sales performance management training suitable for leaders without a sales background?

Yes. Bank sales performance management is taught through cases and templates, assuming experience in retail banking, finance or operations but no formal sales qualification.

Which principles does bank sales performance management training rest on?

Bank sales performance management training rests on sales funnel, incentive design, coaching cadence and conduct safeguard principles, with no single standard governing the subject.

How is the plan from bank sales performance management training used at work?

You use the retail sales performance plan to brief regional managers, agree targets with senior management and run a weekly review of pipeline and conduct measures.

How does bank sales performance management differ from customer relationship management training?

Bank sales performance management centres on targets, pipeline, incentives and coaching for sales teams, while customer relationship management training covers systems, data and customer service journeys.