

2021 Branch Manager Bootcamp E-Classroom Series



**Managing A Successful Branch
Leading Service Excellence
Business Development
Maintaining Superior Team Performance**

Introduction

Community Bankers Association of Illinois, in conjunction with Focused Results, is offering Branch Manager Bootcamp as a four-part E-Classroom Seminar Series! For E-Classroom Seminars with Focused Results, we will be utilizing Zoom. Each Zoom meeting is a private, invitation-only meeting that is password protected. Each of you will receive a login to register and participate in the training. Each attendee will need a computer, as you will be participating individually and in group discussions. With Zoom, we are able to combine a live presentation, screen views, chat and open questions with pod activities. With Zoom, you will be moved into a group pod room, where you will interact with your peers, answer questions and formulate your recommendations to the group, just like an in-person seminar.

After registering, attendees will receive a confirmation email where they can sign up with Zoom and receive their hook up information. All attendees will receive their workbooks via email.

E-CLASSROOM SEMINAR DETAILS

All seminars run from 8 a.m. to 11 a.m. CDT. The instructor will be presenting in front of a slideshow, as if training in front of a classroom. Cost is \$250 per seminar or \$800 for the series for CBAI members and \$450 or \$1,600 for the series for prospective bank members.

The Evolving Role of the Branch Manager

Want to grow your total assets in excess of 20% year-over-year? Wish to grow your deposit base by more than 20%? Then consider an investment in training your Branch Managers in our Branch Manager Bootcamp!

What does your branch have that alternate branch channels and non-bank competitors don't? The branch has you and your people. As the number of branch transactions continues to fall, community banks must reassess the role of the branch manager. Banks must invest in the manager, giving him or her the right people, tools, customer goals, and sales goals, and step back and watch the results change into a dynamic source of profitability. This exciting, four-part series focuses on the next generation manager who will be leading the transition to customer relationship management, and to managing an active advisory environment for the customer to achieve financial goals. The next gen manager will be leading this vital transformation. The program focuses on the critical skills and expectations that need to be developed to ensure that the next generation branch manager exceeds expectations and goals set for them. Participants engage in discussions, small group activities, and skills practices to ensure that ideas shared and learning is entertaining and adopted.

Topics ~ Branch Manager Bootcamp

MANAGING A SUCCESSFUL BRANCH

January 27, 2021

LEADING SERVICE EXCELLENCE

February 24, 2021

BUSINESS DEVELOPMENT

March 24, 2021

MAINTAINING SUPERIOR TEAM PERFORMANCE

April 21, 2021

Meet Our Presenter

Jennie Sobecki is owner and CEO of Focused Results, LLC, a sales and marketing strategy, consulting, and training firm, concentrating in results-driven process consulting and training experience in community banks and FI's. An expert in designing and implementing sales efforts and processes, Sobecki designs solutions to drive top line growth through better utilization and training of existing sales forces, including sales management.

Sobecki is a graduate of Indiana University, Bloomington, and has a certificate in consulting services from Ball State University, Muncie, IN. Prior to joining Focused Results, Sobecki was director of sales and marketing for a \$3 billion bank holding company, sales manager for a high performing mid-level bank, and director of corporate training for a large Midwest insurance company.

MANAGING A SUCCESSFUL BRANCH JANUARY 27, 2021

Branch Manager Part 1 focuses on the foundation skills of a Branch Manager. Managers learn the key elements of managing a successful branch – selecting the team, staffing and scheduling, procedures, and building the team.

Participant Key Skill Transfers to Take Away:

1. Learning to create an energetic and productive workplace.
2. Learning to manage the branch team and integrate technology to drive additional business.
3. Driving business development even when branch traffic is slow.

Program Agenda

- Branch Staffing Model – Layers are Collapsing
- How Technology is Revolutionizing Our Business
- Vision Review – Our Role as Dream Builders
- Defining the Performance Management Process
- Coaching, Counseling, and Disciplining
- Scheduling and Staffing in Today’s Work Environment
- The Bored Board Concept – “Go To” List for Slow Times
- Creating a Fun Work Atmosphere
- Generational Approach to Communicating
- Challenges & Opportunities
- Complete an Action Plan for Skills Transfer back to the Job

LEADING SERVICE EXCELLENCE February 24, 2021

Branch Manager Part 2 focuses on: “The Manager’s Role in Building and Leading an Effective Service and Sales Organization.” Managers will learn to plan and direct the team toward an effective business development effort.

Participant Key Skill Transfers to Take Away:

1. Developing leadership skills to grow the branch.
2. Mastering an understanding of a leading a vibrant service and sales process in a branch environment.
3. Learning to train the branch team in key listening, referring, and selling skills to improve growth.

Program Agenda

- Review Action Plan Successes from Past Session
- Vision Review – Hear the Dream; Pick the Product
- Red Carpet Exercise – Create a Memorable Experience
- Rhythms & Routines at the Branch: The following meetings take less than 1 hour per week to facilitate, and they positively impact the other 39 hours to increase business development activities by all team members:

- › Introduction to Dream Building (Helping clients by listening)
- › Weekly Sales Meetings (What dreams did we find last week? How did we change a life?)
- › AM and PM Huddles (Driving energy at the beginning and end of each day)
- › Mid-Week Clinics (Brief gatherings with a learning topic facilitated by subject matter experts)
- Service and Sales Leadership – Identifying the challenges to expect when driving a service and sales culture at the branch
- Discuss Challenges & Opportunities
- Complete an Action Plan for Skills Transfer back to the Job
- TOOLKIT: Mini Lesson: Listening for Opportunities – Learn how to get the branch staff to listen and refer so we help our clients save money, make money, save time, & find convenience and security.

BUSINESS DEVELOPMENT March 24, 2021

Branch Manager Part 3 focuses on the relationship building process to identify how to gain the trust of your customer, gain a larger share of wallet, and present solutions that solve your customers’ needs.

Participant Key Skill Transfers to Take Away:

1. Mastering pre call planning.
2. Learning to call virtually or in-person on the right (most profitable) customers and prospects.
3. Building relationships with productive referral sources.

Program Agenda

- Introductory Discussion: Our Role in Growing the Branch
- Review Action Plan Successes from Past Session
- Our Past Calling Successes & Challenges
 - › The Value Proposition
- Call Planning on Our Most Profitable Clients
- Gaining the Virtual or In-Person Appointment
- Planning for a Quality Encounter
 - › Determining Lead Officers and Call (Individual or Joint) Strategy
 - › Plan What to Have With You during the Call

- › Plan Bridging and Introductory Comments
- The Initial Meeting
 - › Listening and Communicating How You Can Help
 - › Making a Recommendation and Asking for the Business
 - › Earning Referrals
- Call Follow-Up
 - › Expand Your Notes to Capture the Call
 - › Calendar Follow Up Activities
 - › Assess the Call
- Discussing an Upcoming Customer Call
- Discussing Challenges & Opportunities
- Complete an Action Plan for Skills Transfer back to the Job
- TOOLKIT: Forms for use back on the job

MAINTAINING SUPERIOR TEAM PERFORMANCE

April 21, 2021

Branch Manager Part 4 focuses on maintaining superior performance. Managers learn to evaluate individual performance, and build performance standards that blend with the bank's mission and vision.

Participant Key Skill Transfers to Take Away:

1. Winning motivational strategies.
2. Learning best practices in employee development, performance improvement, and employee recognition.

Program Agenda

- Review Action Plan Successes from Past Session
- Conducting Performance Appraisals
 - › Discuss the Formal Appraisal Process at Your Bank
 - › Look at the Steps in Conducting a Performance Appraisal
 - › Review a Sample Performance Appraisal Written by Branch Managers
 - › What to Do When Things Go Awry

- › Managing Difficult Situations During a Review
- Managing Conflict
 - › Structured Intervention
- Rebalancing the Culture
- Delegating to Build Your Team
- Mentoring the Team
- Performance & Development
- Recognition and Reward – Non-Monetary and Monetary
- Understanding the Challenges Facing the Financial Work Force of Today
- Program Summary
- Complete a Final Action Plan to Grow the Branch

For More Information

Tracy McQuinn, Senior Vice President

Melinda McClelland, Vice President

Jennifer Nika, Vice President

Kim Cordier, Administrative Assistant

Tina Wilder, Administrative Assistant

Department of Education & Special Events

800/736-2224 or 217/529-2265 Fax: 217/585-8738

Terry Griffin, Chicago Area Vice President

773/209-2260

Registration Forms and Fees

BRANCH MANAGER BOOTCAMP

Program Dates/Titles	CBAI Member \$250 each	Non-Member* \$450 each
January 27: Managing a Successful Branch		
February 24: Leading Service Excellence		
March 24: Business Development		
April 21: Maintaining Superior Team Performance		
	CBAI Member \$800	Non-Member* \$1,600
Branch Manager Bootcamp Series (includes ALL FOUR SESSIONS)		
TOTAL AMOUNT DUE:		

*Only financial institutions/firms eligible for CBAI membership. *CDD Discount does not apply to this training.

Name _____

Bank _____

Address _____

Phone _____ Email* _____

*(E-mail address required for registration).

Fax this registration form to: 217/585-8738 Call for more information: 800/736-2224

Mail Registration to: CBAI Education Department, 901 Community Drive, Springfield, IL 62703

Name as It Reads on Card _____ Card Number _____

Billing Address of Card _____

Expiration Date _____ Three-Digit Security Code _____ *(MasterCard, Visa, & Discover accepted)*