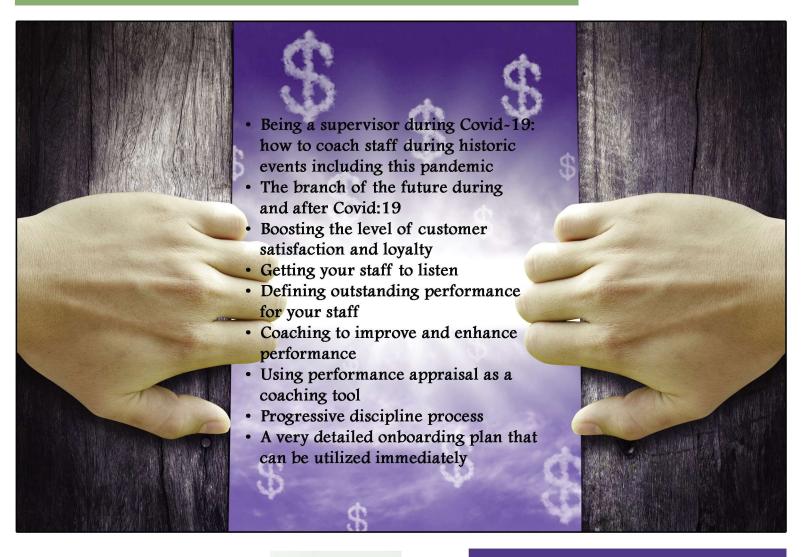
### Frontline Supervisor In The Now Economy







September 30, 2020 Shazam Education Center Springfield, IL

### Course Introduction

We have "The Now Economy" and must learn to maneuver effectively so we grow our business all the while continuing to meet emerging client needs. Bankers all over the bank are delving into the PPP program, answering questions, and processing loans that they never anticipated being involved with. We know that we must continue to help our clients meet their needs outside of the PPP program, and we need to consider how to forge ahead for the remainder of this year and into the next when hopefully our US economy begins to recover.

We play a key role, both as a coach and as a business development professional in banking. This seminar focuses on how the frontline supervisor in the branch can take care of the needs of today, while keeping an eye on the future. It's challenging and exciting to be a banker today, knowing we have the responsibility to grow our team and listen to our clients' needs and position our products and services to help our clients achieve their dreams.

No matter what the title, you play a key role. You manage a retail team that is the face – the image, the impression, the brand – of your bank. Your team is expected to handle the personal and business finances of your customers, cross-sell, and refer appropriately, all with a smile and without mistake. This program gives you the skills to improve team productivity, through coaching, motivating, and accountability. You will enhance your skills in how to reduce boredom, stop procrastination, and poor customer service and supercharge branch performance that increases staff professionalism, customer satisfaction, and customer loyalty.

#### Who Should Attend?

This program is designed for branch managers and head tellers, as well as customer service representatives and universal bankers with supervisory responsibilities.

# **Key**Topics

- The effects of the pandemic on the branch: now and into the future
- Staffing during and after a pandemic
- Boosting the level of customer satisfaction and loyalty
- Company vision
- Getting your staff to listen and refer
- Defining outstanding performance for your staff

- Go-to activities when the branch is slow or empty
- Coaching to improve and enhance perfor mance, even during extraordinary events
- Creating a fun work atmosphere
- Using performance appraisal as a coaching tool
- Progressive discipline process
- Onboarding plan

## About the Presenter.

Jennie Sobecki, co-owner of Focused Results, a company concentrating in results-driven process consulting and training experience in community banks and financial institutions, leads this program. 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. A charismatic speaker and consultant, Sobecki consults with numerous financial service organizations on revenue, sales, sales leadership and organizational performance.

### Registratiques

Fees include hand-out materials, continental breakfast and lunch. An income-tax deduction may be allowed for educational expenses undertaken to maintain or improve professional skills.

#### **Cancellation Policy**

Registrants cancelling two days prior to each seminar receive 100% refund; one day prior, 50%; the day of the seminar, no refund. All cancellations must be made in writing prior to the seminar day. Invoices and training materials will be sent to all "no shows."

#### **CBAI MEMBER**

| First person               | \$265      |
|----------------------------|------------|
| Each additional registrant | \$245 each |

#### \*\*PROSPECTIVE-MEMBER

| First person               | \$465      |
|----------------------------|------------|
| Each additional registrant | \$445 each |

#### CDD members receive a 10% discount.

<sup>\*\*</sup>Only financial institutions/firms eligible for CBAI membership.



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September 30, 2020: Shazam Education Center, Springfield

| <b>Please Print</b><br>Name of Bank   |  |
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| City, State, Zip  |  |
| Tel. No   |  |
| Name/Title  |  |
| E-Mail  |  |
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| Company Name on Card  |  |
| Billing Address of Card   |  |
| Card Number   | Exp. Date  |
| Security Code   |  |

#### **Dates and Locations**

**September 30, 2020** 

Shazam Education Center CBAI Headquarters 901 Community Drive Springfield, IL 62703

#### Agenda

Registration begins at 8:30 a.m. The seminar runs from 9 a.m. to approximately 4 p.m. A continental breakfast & lunch are provided.

CBAI is a registered Public Accounting Continuing Professional Education (CPE) provider by the Illinois Dept. of Financial and Professional Regulation.

#### For More Information

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