


# Frontline Supervisor In The Now Economy



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- A central graphic featuring two hands, one on the left and one on the right, holding a purple rectangular panel. The panel contains a list of topics. The background of the panel is purple with several white dollar signs scattered throughout. The hands are positioned as if they are presenting the panel.
- Being a supervisor during Covid-19: how to coach staff during historic events including this pandemic
  - The branch of the future during and after Covid:19
  - Boosting the level of customer satisfaction and loyalty
  - Getting your staff to listen
  - Defining outstanding performance for your staff
  - Coaching to improve and enhance performance
  - Using performance appraisal as a coaching tool
  - Progressive discipline process
  - A very detailed onboarding plan that can be utilized immediately



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 performance, even during extraordinary events
- Creating a fun work atmosphere
- Using performance appraisal as a coaching tool
- Progressive discipline process
- Onboarding plan

# About the Presenter

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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.

# Registration Fees

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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.***

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

# Registration Form

## Frontline Supervisor In The Now Economy

September 30, 2020: Shazam Education Center, Springfield

### Please Print

Name of Bank \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Tel. No. \_\_\_\_\_

Name/Title \_\_\_\_\_

E-Mail \_\_\_\_\_

Name/Title \_\_\_\_\_

E-Mail \_\_\_\_\_

I have special needs, please contact me before the seminar.

### Please select your payment method.

Check Enclosed

Check in Mail

Pay at Door

Credit Card\*

*\*If you are paying by credit card, please fill out the following information. (Visa, MasterCard & Discover accepted).*

Name as It Reads on Card \_\_\_\_\_

Company Name on Card \_\_\_\_\_

Billing Address of Card \_\_\_\_\_

Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Security Code \_\_\_\_\_



Mail it in:

CBAI Education Department  
901 Community Drive  
Springfield, IL 62703-5184



Fax it in:

(217) 585-8738



Call it in:

(800) 736-2224 (Illinois only)  
(217) 529-2265



Click it in:

[www.cbai.com](http://www.cbai.com)

## 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

Tracy McQuinn, Sr. Vice President  
Melinda McClelland, Vice President  
Jennifer Nika, Vice President  
Kim Harden & Tina Horner,  
Administrative Assistants  
Department of Education  
& Special Events  
800/736-2224 217/529-2265  
Fax: 217/585-8738  
Terry Griffin,  
Vice President  
Chicago Area  
773/209-2260

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