



COMMUNITY BANKERS ASSOCIATION OF ILLINOIS

E-CLASSROOM SEMINARS

Generational Customer Retention and Growth Strategies and Tactics

Thursday, May 28, 2020

8 - 11 am

This fast-paced, e-classroom seminar looks at the differences in opinions, views and behaviors of each generation. You learn how to modify your strategies to grow business from each generational segment, including appropriate adjustments to your digital and in-person customer approaches and experiences. There is a generational wave of wealth transference, and you want to be able to stay atop the wave. Our Zoom software enables you to get an in-person like experience online, including discussion rooms. Your competitors' are competing for the attention and loyalty from iGen, Millennials, Gen X and Baby Boomers, with clear winners and losers. You discover specific actions to take to improve the sales and service aspects, and to increase your revenue in excess of ten percent.

AGENDA

- The big differences between generations, and also the startling similarities in decisionmaking
- Which marketing approaches appeal to each generation
- New ways to engage all groups in person, and digitally
- Checking, deposit products, e-banking, wealth management and insurance
- Targeting loan growth
- Educational approaches
- Tactical roadmap to beat your competition

WHO SHOULD ATTEND?

Executive vice presidents of retail, executive vice presidents of commercial and consumer lending, business development officers, vice presidents of marketing, marketing managers, branch managers and anyone else engaged in the marketing and selling of banking services to the younger customer or prospect benefit from this program.

FACILITATORS

Duane Sobecki, founder, co-owner, and CSO of Focused Results, Sobecki is a renowned authority in sales strategy and strategic market segmentation. Sobecki provides assertive strategies to drive loan demand, business development, product and service lines to community banks and other FI's. Sobecki specializes in helping the financial services industry better segment important markets, and direct sales and marketing strategies at those key segments to ensure revenue and profit growth. Sobecki holds BS from the Kelley School of Business at Indiana University, Bloomington, and has a certificate in management planning from the University of Illinois - Chicago.

Jennie Sobecki 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.

For E-Classroom Seminars with Focused Results, we will be utilizing ZOOM. 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.

REGISTRATION FORM

GENERATIONAL CUSTOMER RETENTION AND GROWTH STRATEGIES AND TACTICS

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Name _____ Title _____

Bank _____

Street Address _____

City/State/Zip _____

Phone _____ Fax _____ Email _____

(E-mail address is required for registration).

REGISTRATION FEES:

CBAI MEMBER.....\$345

*PROSPECTIVE MEMBER.....\$545

*Only financial institutions/firms eligible for CBAI membership.

Please select your payment method.

Check Enclosed Check in Mail Credit Card

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

Name as It Reads on Card _____ Card Number _____

Company Name on Card _____ Expiration Date _____

Billing Address of Card _____

Three-Digit Security Code _____



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