



# COMMUNITY BANKERS ASSOCIATION OF ILLINOIS

## E-CLASSROOM SEMINARS

### Becoming the Primary Financial Institution

Thursday, May 21, 2020

8 - 11 am

Competition is fragmenting the purchase of financial products across all lines of business. Clients split their share of wallets, buying nine to ten products with six to seven financial institutions. This fast moving Zoom seminar identifies who is buying your products, and what products they buy from the competition, including non-banks. We address how to respond to leverage your advantages as a community financial institution to increase your share of wallet, and become the Primary Financial Institution.

#### AGENDA

- We cover your services and revenues that are at risk
- Lessons from other disrupted industries
- Your competitive advantages
- What are clients really looking for?
- What about the Millennial?
- The digital client
- Where do the clients go? Where are they buying?
- Recapture lost assets – loans, deposits, investment, services

#### WHO SHOULD ATTEND?

Community bank CEO's, presidents, executive vice presidents, senior vice presidents and vice presidents of retail, commercial lending, mortgage and consumer lending, branch administration, marketing, wealth management and anyone responsible for driving sales results in a community bank 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

## BECOMING THE PRIMARY FINANCIAL INSTITUTION

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8 - 11 am

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 \_\_\_\_\_



Mail it in:  
CBAI Education Department  
901 Community Drive  
Springfield, IL 62703-5184



Call it in:  
(217) 529-2265



Fax it in:  
(217) 585-8738



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