

E-Classroom Seminar Series



Driving Deposits in the Branch Post Covid-19

Increasing Branch Lending in the New Economy

**Don't Ignore Women: Business, Savings and
Investment Opportunities**

Leadership After Covid-19

Introduction

Community Bankers Association of Illinois, in conjunction with Focused Results, is offering 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 \$345 per seminar or \$1,200 for the series for CBAI members and \$545 or \$2,000 for the series for prospective bank members.

Topics

DRIVING DEPOSITS IN THE BRANCH POST COVID-19

July 22

INCREASING BRANCH LENDING IN THE NEW ECONOMY

July 30

DON'T IGNORE WOMEN: BUSINESS, SAVINGS AND INVESTMENT OPPORTUNITIES

August 12

LEADERSHIP AFTER COVID-19

August 19

MEET YOUR PRESENTERS

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 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.

DRIVING DEPOSITS IN THE BRANCH POST-COVID 19

July 22, 2020

With increasing risk in this new economy, you may have to look at increasing new deposits and holding on to your existing deposit base. How do you do that with customers interacting differently than they did last year? This entertaining and fact-oriented presentation shows you how to develop the best approach to set the conditions for increasing deposits and the best tips for making deposit gathering beneficial for the customer and fun for the banker. We reveal what drives the customer and what is the real motivation, plus look at what the next logical product the customer or prospect is willing to buy. We also examine how to make the existing deposit client price insensitive, and more attuned to the value you deliver.

Senior Executives, VP's of marketing, directors of marketing, senior branch management, branch managers, cash managers and other bank managers and leaders that must improve deposit sales performance in a community bank environment benefit from this seminar.

Seminar Agenda:

- The bank atmosphere and a “helpful, advisory” philosophy
- Helping the customer save
- Customer acquisition
- Reducing deposit customer attrition
- Cross-selling
- Next logical product
- Your best customers strategies
- Cash management
- Higher interest options
- Remote deposit
- Checking strategies
- Killer business development ideas

INCREASING BRANCH LENDING IN THE NEW ECONOMY

July 30, 2020

Demand is still out there for the rest of 2020, in residential and consumer lending. You just have to know where to look. This engaging presentation examines the ways community banks can locate these opportunities, which other niches you should consider, and act more quickly than your competition.

We examine how to generate more opportunities and loans from your existing customers, and how to leverage relationships for additional products and additional referrals. We then cover the tactics that enable you to grab loan opportunities away from your competitors, and to incorporate the best options for managing the Post-Covid 19 economy.

Business development officers, small business specialists and lenders, branch managers, sales managers, senior vice presidents and vice presidents of lending, sales, or retail, consumer lenders, marketing directors and coordinators, and other professionals that are responsible for increasing consumer loan volume.

Seminar Agenda:

- Advisory positioning
- Key market segments, and how to reach them
- Which customers and prospects are most likely to borrow?
- Someone needs to make smart sales calls (video, phone, or in-person)
- Millennials and their first bank
- Profitability relationships
- Low return relationships
- Quick mortgage ideas
- Onboard everyone
- Prospecting strategies
- Lending and cash management linkage

DON'T IGNORE WOMEN: BUSINESS, SAVINGS AND INVESTMENT OPPORTUNITIES

August 12, 2020

This fast-paced and entertaining presentation highlights the challenges facing women as financial decision-makers, investors, and business-people – and celebrates the success they have and how your bank can help celebrate their success. We examine what women who own businesses say about what is going on now, from their biggest issues to where they see opportunity happening. Women also face longer lifetimes, with lower earnings, and we illustrate strategies and tactics for the community bank to take to improve the retirement readiness of women in general, and women business owners in particular.

Any community banker that wishes to help the female business owner and investor reach business and retirement goals including marketing directors, retail banking officers, directors, and executives, commercial lenders and wealth managers benefit from this seminar.

Seminar Agenda:

- The earnings gap
- Covid-19 and work disruption
- Women retirement facts
- Women retirement strategies to offset shortfalls – community banking at its best
- Motivations behind women-owned business
- Small business trends and women ownership
- WBENC and other options for the woman-owned business

LEADERSHIP AFTER COVID-19

August 19, 2020

It's pretty clear that Covid-19 is the most significant challenge and opportunity for your bank since the great recession, and may be the largest challenge since the great depression. As a leader in your bank, you have to make sure customers survive financially, all while social-distancing, and managing a remote workforce. This smartly paced presentation looks at some practical approaches you can take to leading your team through the next six months of 2020.

Any manager, director, or executive that manages people in a community banking environment. benefit from this seminar.

Seminar Agenda:

- Bank business continuation now, and if the disease flares
- Helping your customers make good savings, investing and borrowing decisions – developing the advisory environment
- Leading my remote workforce
- Maintaining employee engagement in difficult situations
- Considerations for reducing operating costs in my area
- What can I expect in terms of my goals and objectives for the rest of the year
- Your tactics and strategies for the rest of 2020

For More Information

Tracy McQuinn, Senior Vice President

Melinda McClelland, Vice President

Jennifer Nika, Vice President

Kim Harden, Administrative Assistant

Tina Horner, 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

E-CLASSROOM SEMINAR SERIES

Program Dates/Titles	CBAI Member \$345 each	Non-Member* \$545 each
July 22: Driving Deposits in the Branch Post Covid-19		
July 30: Increasing Branch Lending in the New Economy		
August 12: Don't Ignore Women: Business, Savings and Investment Opportunities		
August 19: Leadership After Covid-19		
	CBAI Member \$1,200	Non-Member* \$2,000
E-Classroom Seminars Series (includes ALL FOUR SEMINARS)		
TOTAL AMOUNT DUE:		

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

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)*