

2021 Universal Banker Program E-Classroom Series



**Culture Shifting in Community Banks
Wowing the Client
Your Advisory Role
Ambassadorship & Growth**

Introduction

Community Bankers Association of Illinois, in conjunction with Focused Results, is offering Universal Banker Program as a four-part 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 \$250 per seminar or \$800 for the series for CBAI members and \$450 or \$1,600 for the series for prospective bank members.

2021 Universal Banker Program E-Classroom Series

With constant change facing community banks, transactions falling, and overall visits declining, we must find ways to engage our customers, new customers, and the community. We must find ways to deliver better customer service in a more efficient manner. Universal Banker Program is a 4-part, comprehensive program for beginning and new community bankers that focuses on creating a customer friendly environment on a budget. This program focuses on how we deliver the ultimate customer experience, streamlining work processes to make things fun for employees and the customer, resulting in the optimal bank of the future. The program includes group discussion and problem solving, fresh ideas through presentation, and a case-study.

Universal Banker Program provides bankers with:

- An understanding of the challenges in community banking;
- An opportunity to learn and about the best user/customer experience;
- The ability to plan for the impact of technology, artificial intelligence, and self-service on the community bank and banker; and
- The skills to be an ambassador for the bank, and build your personal network.

Topics ~ Universal Banker Program

CULTURE SHIFTING IN COMMUNITY BANKS

January 28, 2021

WOWING THE CLIENT

February 25, 2021

YOUR ADVISORY ROLE

March 25, 2021

AMBASSADORSHIP & GROWTH

April 22, 2021

Meet Our Presenter

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.

CULTURE SHIFTING IN COMMUNITY BANKS

JANUARY 28, 2021

Focuses on the shift from order-taking to an engaged, advisory culture and the team issues faced when changing cultures.

Participant Key Skill Transfers to Take Away:

1. Maximizing performance in the branch, especially when it's not busy.
2. Maximizing the Universal Banker's own performance as an individual contributor on the branch team.

Program Agenda

- Why community banks have challenges competing in the market
- How technology is revolutionizing our business
- Winning qualities of an effective universal banker
- Creating the advisory environment across the company

- Growing the community bank appropriately
- Branch staffing model – layers are collapsing
- Challenges in changing the culture
- Analyzing staff performance across the bank
- Critical thinking – seeing the big picture of company growth goals
- War Games – Plan to protect your company's market share from the competition
- The Why's – Learn the why I am doing something and the inter working of the job using the 80/20 Rule
- Action plan for skills transfer back to the job
- Assignment/Project to be completed before Part 2 – Improve a work process

WOWING THE CLIENT

February 25, 2021

Addresses the needs, wants, and expectations of the new, digital, and younger customers and employees.

Participant Key Skill Transfers to Take Away:

1. Learning how to ask great customer questions.
2. Working with customers to identify goals and dreams.
3. Selling appropriate products to actualize client dreams and goals.

Program Agenda

- Present each team's Part 1 Assignment/Project findings to the class – Improve a work process
- Expectations from top customers, whether they visit us at the branch or not
- Growing the client relationship – onboarding and all-boarding
- Dream building insights – dreams you are finding through client encounters
- Establishing baseline service standards – Hear the dream; pick the product
- Creating the ultimate UX (user/customer experience) – Being a brand advocate

- Great Cross-Selling – asking great questions to get the client talking to discover dreams
- Data vs. data driven decision-making – You know the company's products and how they help your clients. Discover ways to convert more relationships into business.
- Streamlining your work processes – red carpet exercise
- iGen and millennial customers – trouble and opportunity ahead, must be able to manage relationships up and down with co-workers, and with customer relationships
- Develop leadership skills and wow your employer – They will take notice
- Team work and flexibility go both ways – employee and employer – there is no department priority over the overall bank
- Action plan for skills transfer back to the job
- Assignment/Project to be completed before Part 3: What are you top 3 questions to uncover dreams? How are you rolling out the red carpet?

YOUR ADVISORY ROLE

March 25, 2021

Presents opportunities for the bank and banker to engage in activities and skills to drive results across the bank for the foreseeable future.

Participant Key Skill Transfers to Take Away:

1. Learning how to recognize a sales cue and a buying signal.
2. Learning how to leverage technology and social media as tools to help customers reach financial goals.

Program Agenda

- Present each team's Part 2 Assignment/Project findings to the class – What are your top 3 questions to uncover dreams? How are you rolling out the red carpet?
- Bank products – What company products do you use?
- Growing the Branch – The Bored Board Concept
- Listening for Opportunities – Recognizing the sales cue or life cycle event and matching our bank's products to help clients
- Referral form and procedures to get the client to the right banker for help
- The bank of the future – technology, artificial intelligence, and self service

- Transitioning your branch to meet emerging trends
- Team rewards – How does your team celebrate successes?
- Social skills at events and during work time – How do you interact with clients in the lobby? How do you make a positive impression representing the company while away from work?
- Social and business communication/etiquette
- Social media – What to share on Facebook, Twitter – Does it represent you well?
- Action plan for skills transfer back to the job
- Assignment/Project to be completed before Part 4 – Make a Bored Board

AMBASSADORSHIP & GROWTH

April 22, 2021

Addresses critical skills necessary to make the banker more valuable in the bank, and in the community at large.

Participant Key Skill Transfers to Take Away:

1. Learning to leverage interactions away from the workplace to capture additional business.
2. Learning to best represent the bank away from work.

Program Agenda

- Present each team's Part 3 Assignment/Project findings to the class – Make a Bored Board
- Being an ambassador for your bank
 - › Consider people you talk to within the community who mention financial issues
 - › Networking with clients
 - › Referrals discussion
 - › Networking with referral sources and centers of influence
 - › Networking with prospects

- › Building your network across lines of business at the company
- › Skills practice: Scenarios on being an ambassador for the bank
- Dress in public – Better to overdress than under dress, and dress code standards at the company
- Doing it right the first time – Proof reading for accuracy
- Assessing strengths and weaknesses – Yours and the bank's
- Community bank case study: What can you improve back at the bank? What recommendations do you have to execute these improvements?
- Summary of the series
- Action plan to bring improvements back to work

For More Information

Tracy McQuinn, Senior Vice President

Melinda McClelland, Vice President

Jennifer Nika, Vice President

Kim Cordier, Administrative Assistant

Tina Wilder, 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

UNIVERSAL BANKER PROGRAM

Program Dates/Titles	CBAI Member \$250 each	Non-Member* \$450 each
January 28: Culture Shifting in Community Banks		
February 25: Wowing the Client		
March 25: Your Advisory Role		
April 22: Ambassadorship & Growth		
	CBAI Member \$800	Non-Member* \$1,600
Universal Banker Program (includes ALL FOUR SESSIONS)		
TOTAL AMOUNT DUE:		

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

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)*