



# COMMUNITY BANKERS ASSOCIATION OF ILLINOIS

## E-CLASSROOM SEMINARS

**Winning Onboarding Approaches**  
**Thursday, April 30, 2020**  
**8 - 11 am**

Market conditions provide more pressure on financial institutions to increase revenue with new client relationships. Onboarding should be one of the most important strategies to hit revenue goals for this year and next. Onboarding goes beyond the welcome letter and a one call follow-up. This three-hour Zoom seminar describes low cost, winning approaches to client retention and cross selling additional products and services, even without a CRM or MCIF software or system. If you are looking to create an onboarding program, enhance your existing program, or create an “intelligent system” then this webinar is for you. Our Zoom software enables you to have an in-person, seminar experience right at your computer. You have a presenter, opportunities to ask questions and group discussion rooms as part of the experience.

### AGENDA

- Is the first 90 days fast enough?
- Who is your client, really?
- A winning image
- Cross-sell for increased wallet share
- The most likely products
- Onboarding metrics
- Retail and commercial onboarding
- Onboarding Process Sample
- “Intelligent” onboarding

### WHO SHOULD ATTEND?

Financial institution marketers, marketing directors, vice presidents of marketing, retail executives, branch managers and anyone else responsible for the onboarding and follow-up processes in a financial institution environment 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

## WINNING ONBOARDING APPROACHES

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



**Call it in:**  
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