

BRANCH LEADER FUNDAMENTALS



One Mission. Community Banks.

DAY 1: SEPTEMBER 10, 2026

DAY 2: OCTOBER 8, 2026

Shazam Education Center

CBAI Headquarters

Springfield, IL

This program is designed to equip retail branch leaders, starting with an understanding of the key roles successful branch managers play. Participants learn about branch business and action planning, objective and expectation-setting, feedback and coaching fundamentals, and tactics for developing team skills in sales and customer service.

- Two full-day, in-person sessions supplemented by two virtual/web de-brief and accountability sessions.
- Pre-work and homework assignments prepare participants to fully engage and then apply what they learn.
- Participants leave with a toolkit of supporting templates for their ongoing use.

Session	Topics and Skills Covered
Day 1: Building and Leading Effective Teams September 10, 2026	• Understanding the key success factors in the branch leadership role based on relevant trends in consumer behavior and the industry. • Why and how to do quarterly business and action planning for growing/retaining the customer base, delivering a winning customer experience, operational excellence and team development. • Leveraging Peer Power through group coaching and learning • Disciplines for managing team performance: defining and articulating expectations; co-creating commitments; effective huddles; weekly game plan. • Tools include: self-assessment, quarterly action-planning guide and template, team meeting guide and team skill-building templates, and partner planning guide
Virtual Webinar: TBD	• Post-session de-brief for accountability and learning from others; Pre-work for session 2 delivered
Day 2: Developing Individuals October 8, 2026	Developing Others • Dispelling myths about motivating others • Communication essentials • Delegating effectively • Developing others through learning assignments • Feedback skills • Coaching skills • Tools include conversation planner, feedback and coaching conversation models, monthly coaching guide, quarterly development guide
Virtual Webinar: TBD	• Post-session de-brief for accountability and learning from others

Agenda

Registration begins at 8:30 a.m. The seminar runs from 9 a.m. to approximately 4 p.m. Continental breakfast and lunch provided.

Date & Location

Day 1: September 10, 2026

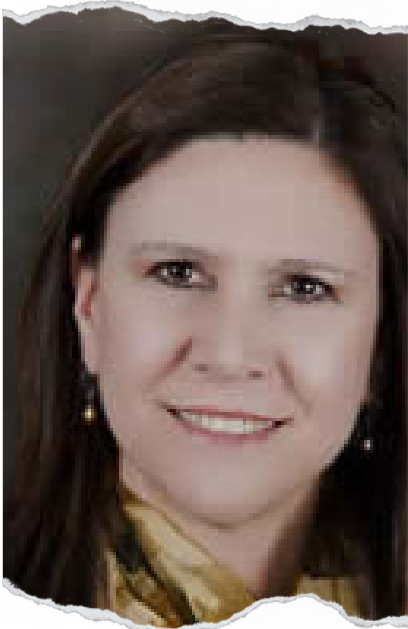
Day 2: October 8, 2026

SHAZAM Education Center: CBAI Headquarters
901 Community Drive
Springfield, IL 62703
800.736.2224

Meet Your Instructor

Diahn Hevel, Founder, Hevel + Co.

Diahn Hevel brings 30 years of business leadership, facilitation, and consulting experience to your leadership team. Her corporate career included responsibilities for P&L, product management, training, customer experience, internal communications, and incentive program management. Her proven results in sales/profit center management and pragmatic, agile approach generate collaborative and trusting long-term relationships with leaders of all levels. Hevel is known as a dot-connector and strong communicator. In addition to her MBA, she has completed the Coach Training Alliance and Dartmouth’s Leading Strategic Change programs. She is a certified DISC-Plus (behavior and motivators) consultant and facilitator of the Coach2Lead leadership development program. Her toolbox also includes Emotional Intelligence (TTI EQ), Strengths Finder®, and Prosci Change Management tools. She serves as an adjunct instructor in Business Management programs for Columbus State Community College.



Registration Fees & Information

CBAI MEMBER

Each Registration..... \$529

***PROSPECTIVE-MEMBER**

Each Registration..... \$929

**Only financial institutions/firms eligible for CBAI membership.*

CANCELLATION POLICY

Registrants cancelling two days prior to each seminar receive a 100% refund; one day prior, 50%; the day of the seminar, no refund. *All cancellations must be made in writing prior to the seminar day. Invoices and training materials will be sent to all “no shows.”* Fees include handout materials, breakfast, lunch and refreshment breaks. An income-tax deduction may be allowed for educational expenses undertaken to maintain or improve professional skills.

TRAINING MATERIALS

Prior to the seminar, you will be emailed a link containing handout materials, seminar certificate, evaluation form and seminar attendee list. Please print and bring materials with you or download them on your own device to access during the program. CBAI will provide power cords in several designated locations to charge devices. *(NOTE: If you have NOT received the link one day prior to the seminar, please email Melinda McClelland at melindam@cbai.com or call 800.736.2224.)*

CONTINUING EDUCATION

CBAI is a registered Public Accounting Continuing Professional Education (CPE) provider by the Illinois Department of Financial and Professional Regulation. If you have earned an ICBA Certification, CPE credit earned through your state banking association may be submitted for CPE purposes. Please note, approval is subject to review and must satisfy the respective certification requirements.

Registration Form

Branch Leader Fundamentals

Day 1: September 10, 2026 Day 2: October 8, 2026 Webinars TBD

Shazam Education Center: CBAI Headquarters, Springfield, IL

Bank Name _____ Telephone # _____

Address _____

City, State, Zip _____

First Registrant Name _____

First Registrant E-Mail _____ Title _____

Additional Registrant Name _____

Additional Registrant E-Mail _____ Title _____

☐ I have special needs, please contact me before the seminar.

Please select your payment method: ☐ Check Enclosed ☐ Check in Mail ☐ Pay at Door ☐ Credit Card*

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

Name as it Reads on Card _____

Billing Address of Card _____

Card Number _____ Exp. Date _____ Security Code _____

For More Information

DEPARTMENT OF EDUCATION & SPECIAL EVENTS

Tracy McQuinn, Senior Vice President

Melinda McClelland, Senior Vice President

Jennifer Nika, Vice President

Tina Wilder, Administrative Assistant



Community Bankers Association of Illinois
901 Community Drive, Springfield, IL 62703



800.736.2224 or 217.529.2265



217.585.8738



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