2025 BRANCH MANAGER BOOTCAMP

Presented by Focused Results

Upcoming Series!

Live Virtual Training

8 – 11 a.m.

Program Overview

Invest in training your branch managers in growing their branch and their team.

- This exciting four-part series will focus on growing the branch manager and their team.
- This training teaches branch managers to grow the branch by helping their clients reach their financial dreams.
- Participants will engage in small group breakouts, where they interact with branch managers from across the country.
- Participants will learn national best practices and expand their network.

Who Should Attend

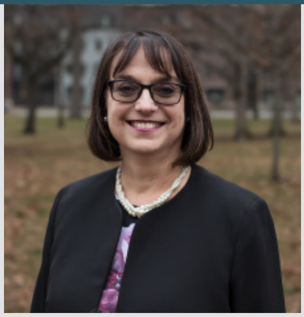
new and experienced branch managers, assistant branch managers, teller supervisors, lead frontline professionals and any professional aspiring to lead the team in a retail branch

Topics

1. Managing a Successful Branch
2. Leading Service Excellence
3. Business Development
4. Maintaining Superior Team Performance

Meet Your Presenter

Jennie Mitchell



Jennie Mitchell is Owner and CEO of Focused Results, a sales and marketing strategy, consulting, and training firm concentrating on results-driven process consulting and training experience in community banks and other financial institutions.

Prior to joining Focused Results, she was Director of Sales and Marketing for a $3 billion bank holding company, Sales Manager for a high-performing mid-level Indianapolis bank, and Director of Corporate Training for a large Midwest insurance company.

E-Classroom Seminar Details

All seminars run from 8 to 11 a.m. CST. 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. Banks may register for the entire series, and a different individual from the bank can attend the session that applies to his or her job responsibilities.

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TOPIC 1
Managing a Successful Branch

OBJECTIVE

Branch Manager Part 1 focuses on the foundation skills of a branch manager.

Managers learn the key elements of managing a successful branch – selecting the team, staffing and scheduling, procedures and building the team.

Participant Key Skill Transfers to Take Away

1. Learn to create an energetic and productive workplace.
2. Learn to manage the branch team and integrate technology to drive additional business.
3. Drive business development even when the branch traffic is slow.

Program Agenda

- Branch Staffing Model – Layers are Collapsing
- How Technology is Revolutionizing Our Business
- Vision Review – Our Role as Dream Builders
- Defining the Performance Management Process
- Coaching, Counseling, and Disciplining
- Scheduling and Staffing in Today's Work Environment
- The Bored Board Concept – "Go To" List for Slow Times
- Creating a Fun Work Atmosphere
- Generational Approach to Communicating
- Challenges and Opportunities
- Complete an Action Plan for Skills Transfer Back to the Job

Managing a Successful Branch Dates

Series 1:
September 17

Series 2:
September 25

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TOPIC 2

Leading Service Excellence

OBJECTIVE

Branch Manager Topic 2 focuses on:

“The Manager’s Role in Building and Leading an Effective Service and Sales Organization.”

Managers will learn to plan and direct the team toward aneffective business development effort.

Participant Key Skill Transfers to Take Away

1. Develop leadership skills to grow the branch.

2. Master an understanding of a leading a vibrant service and sales process in a branch environment

3. Learn to train the branch team in key listening, referring, and selling skills to improve growth

Program Agenda

- **Review Action Plan Successes from Past Session**
- **Vision Review –** Hear the Dream; Pick the Product
- **Red Carpet Exercise –** Create a Memorable Experience
- **Rhythms & Routines at the Branch**
- **Introduction to Dream Building** (Helping clients by listening)
- **Weekly Sales Meetings** (What dreams did we find last week? How did we change a life?)
- **AM and PM Huddles** (Driving energy at the beginning and end of each day)
- **Mid-Week Clinics** (Brief gatherings with a learning topic acilitated by subject matter experts)
- **Service and Sales Leadership –** Identifying the challenges to expect when driving a service and sales culture at the branch
- **Discuss Challenges & Opportunities**
- **Complete an Action Plan for Skills Transfer back to the Job**
- **TOOLKIT: Mini Lesson: Listening for Opportunities –** Learn how to get the branch staff to listen and refer so we help our clients save money, make money, save time, & find convenience and security.

Leading Service Excellence Dates

Series 1:
October 22

Series 2:
October 30

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TOPIC 3
Business Development

OBJECTIVE

Branch Manager Topic 3 focuses on the relationship building process to identify how to gain the trust of your client, gain a larger share of wallet, and present Solutions that solve your clients' needs.

Participant Key Skill Transfers to Take Away

1. Master pre–call planning.

2. Learn to call virtually or in-person on the right (most profitable) clients and prospects.

3. Build relationships with productive referral sources.

Program Agenda

- **Introductory Discussion: Our Role in Growing the Branch**
- **Review Action Plan Successes from Past Session**
- **Our Past Calling Successes and Challenges**
- – The Value Proposition
- **Call Planning on Our Most Profitable Clients**
- **Gaining the Virtual or In-Person Appointment**
- **Planning for a Quality Encounter**
  - – Determining Lead Officers and Call (Individual or Joint) Strategy
  - – Plan What to Have With You during the Call
  - – Plan Bridging and Introductory Comments
- **The Initial Meeting**
  - – Listening and Communicating How You Can Help
  - – Making a Recommendation and Asking for the Business
  - – Earning Referrals
- **Call Follow-Up**
  - – Expand Your Notes to Capture the Call
  - – Calendar Follow – Up Activities
  - – Assess the Call
- **Discussing an Upcoming Client Call**
- **Discussing Challenges and Opportunities**
- **Complete an Action Plan for Skills Transfer Back to the Job**
- **TOOLKIT: Forms for Use Back on the Job**

Business Development

Series 1:
November 13

Series 2:
November 20

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MBA
MISSOURI BANKERS ASSOCIATION

TOPIC 4
Maintaining Superior Team Performance

OBJECTIVE

Branch Manager Topic 4 focuses on maintaining superior performance. Managers learn to evaluate individual performance and build performance standards that blend with the company's mission and vision.

Participant Key Skill Transfers to Take Away

1. Explore winning motivational strategies.

2. Learn best practices in employee development, performance improvement, and employee recognition.

Program Agenda

- **Review Action Plan Successes from Past Session**
- **Conducting Performance Appraisals**
  - – Discuss the Formal Appraisal Process at Your Company
  - – Look at the Steps in Conducting a Performance Appraisal
  - – Review a Sample Performance Appraisal Written by Branch Managers
  - – What to Do When Things Go Awry
  - – Managing Difficult Situations During a Review
- **Managing Conflict**
  - – Structured Intervention
- **Rebalancing the Culture**
- **Delegating to Build Your Team**
- **Mentoring the Team**
- **Performance and Development**
- **Recognition and Reward – Nonmonetary and Monetary**
- **Understanding the Challenges Facing the Financial Workforce of Today**
- **Program Summary**
- **Complete a Final Action Plan to Grow the Branch**

Maintaining Superior Team Performance Dates

Series 1:
December 10

Series 2:
December 18

Cancellations/ Refunds

Full refunds will be granted for cancellations recieved by MBA at least 10 days prior to the seminar date. After that date, an administrative fee of $10 per canceled registration will be retained. Cancellations will not be accepted four days prior to the seminar. Substitutions are always permitted.

Registration Information

Choose a package of all four lessons or choose a combination of dates with "Build Your Own Series."

Per Person:
4-Lesson Series: $800

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MBA
MISSOURI BANKERS ASSOCIATION

REGISTRATION FORM

Please PRINT or TYPE below. You may photocopy this form for additional registrants.

Bill to:

Name ____ **Title** ____

Email ____ **Phone** ____

Address ____ **City/State/ZIP** ____

Bank ____

Dates available

Choose a package of all four lessons or choose a combination of dates with "Build Your Own Series."

4-Lesson Series: $800

Please check which series you would like to attend.

☐ **SERIES 1**
Sept 17
Oct 22
Nov 13
Dec 10

☐ **SERIES 2**
Sept 25
Oct 30
Nov 20
Dec 18

☐ **Build Your Own Series**

Build Your Own Series lets you chose dates in any series.

If you would like to build your own series please contact MBA at 573-636-8151 or lrush@mobankers.com.

Method of Payment ______________

4 – Lesson Series Package...........$800 #_____ $_____

Total Amount Due... $_____

☐ Check enclosed, payable to MBA.

☐ Invoice the bank.

☐ Credit Card Payment* (Please type.)

Exp. Date______________CVV_________________

No.____

Type Name___________________________________

Signature____________________________________

Three Ways to Register

573-636-8151

mobankers.com (Select the Education & Training tab for more information)

Mail check payable to Missouri Bankers Association and form to:

Missouri Bankers Association
P.O. Box 57
Jefferson City, MO 65102