FOCUSED RESULTS

MISSOURI BANKERS ASSOCIATION

FRONTLINE BRANCH SERIES

LIVE E-CLASSROOM SERIES

Each Session – 8 to 11 a.m

Introduction

Frontline Branch Series is a 4-part, comprehensive series for beginning and new frontline professionals that focuses on creating a client-friendly environment on a budget.

This series will focus on how we deliver the ultimate client experience, streamlining work processes to make things fun for employees and the client, resulting in the optimal institution of the future.

The series includes group discussion and problem solving, fresh ideas through presentation, and a case-study.

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 $300 per seminar or $900 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.

Who Should Attend

Retail staff in the branches, or staff wanting to move into the branches. These professionals may be new hires, new to the field, or professionals with years of experience. They are the emerging professionals who want to become qualified to move laterally or forward in the organization.

Topics

Culture Shifting in Financial Institutions

An understanding of the challenges in our industry

Wowing the Client

The skills to be an ambassador for the financial institution, and build your personal network

Your Advisory Role

An opportunity to learn and about the best ux-user/client experience

Ambassadorship & Growth

The ability to plan for the impact of technology, artificial intelligence, and self-service on your financial institution and employees

Spring/Winter

Jan. 28 | Feb. 25 | March 25 | April 22

Summer

May 13 | June 24 | July 29 | Aug. 26

Fall

Sept. 23 | Oct. 28 | Dec. 2 | Dec. 16

Meet Our Presenter

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.

Culture Shifting in Financial Institutions

OVERVIEW

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 frontline professional's own performance as an individual contributor on the branch team.

Program Agenda

- **Why financial institutions have challenges competing in the marketplace**
- **How technology is revolutionizing our business**
- **Winning qualities of an effective frontline professional**
- **Creating the advisory environment across the company**
- **Growing the financial institution appropriately**
- **Branch staffing model -** Layers are collapsing
- **Challenges in changing the culture**
- **Analyzing staff performance across the company**
- **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 interworking of the job using the 80/20 Rule
- **Action plan for skills transfer back to the job**

Culture Shifting in Financial Institutions

Spring/Winter
Jan. 28

Summer
May 13

Fall
Sept. 23

Wowing the Client

Overview

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

Participant Key Skill Transfers to Take Away

1. Learning how to ask great client questions.
2. Working with clients 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 clients -** Whether they visit us at the branch or not
- **Growing the client relationship -** Onboarding and All-Aboarding
- **Dream building insights -** Dreams you are finding through client encounters
- **Establishing baseline service standards -** Hear the dream; pick the product
- **Creating the ultimate user/client experience -** Being a brand advocate
- **Great Cross-Selling -** Asking great questions to get the client talking to discover dreams
- **Data versus 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 clients -** Trouble and opportunity ahead, must be able to manage relationships up and down with co-workers and with client 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 business
- **Action plan for skills transfer back to the job**
- **Assignment/Project to be completed before Part 2:** What are your top 3 questions to uncover dreams? How are you rolling out the red carpet?

Wowing A Client

Spring/Winter

Feb. 25

Summer

June 24

Fall

Oct. 28

Your Advisory Role

Overview

Presents opportunities for the business and employee to engage in activities and skills to drive results across the business 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 clients 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?
- **Your 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 company's products to help clients
- **Referral form and procedures to get the client to the right employee for help**
- **The financial institution 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 3 –** Make a Bored Board

Your Advisory Role

Spring/Winter
March 25

Summer
July 29

Fall
Dec. 2

Ambassadorship & Growth

Overview

Addresses critical skills necessary to make the employee more valuable in the company 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 financial institution 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 company**
    - 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 company
- **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 company's**
- **Financial Institution case study:** What can you improve back at the branch? What recommendations do you have to execute these improvements?
- **Summary of the series**
- **Action plan to bring improvements back to work**

Ambassadorship & Growth

Spring/Winter

April 22

Summer

Aug. 26

Fall

Dec. 16

REGISTRATION FORM

Three Ways to Register

573-636-8151

mobankers.com

Mail check payable to Missouri Bankers Association and form to:

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

Frontline Branch Series – Online Seminar

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: $900

1–Lesson: $300

Please check which series you would like to attend.

WINTER/SPRING

☐ Jan. 28
Feb. 25
March 25
April 22

SUMMER

☐ May 13
June 24
July 29
Aug. 26

FALL

☐ Sept. 23
Oct. 28
Dec. 2
Dec. 16

Method of Payment ______________

4 – Lesson Series Package............$900 #_____ $_____

1 – Individual Lesson..................$300 #_____ $_____

Total Amount Due... $_____

☐ Check enclosed, payable to MBA.

☐ Invoice the bank.

☐ Credit Card Payment* (Please type.)

Exp. Date______________CVV________________

No.____

Type Name__________________________________

Signature____________________________________

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.