

## WOWING THE CLIENT

### LIVE E-CLASSROOM SEMINAR

*Choose from 3 Dates – 8 to 11 a.m.*

Feb. 25 | June 24 | Oct. 28



#### Overview

Our workshop on Wowing the Client covers the skills needed by frontline branch professionals as they care for clients and help them realize their financial dreams.

We will explore the trends in banking today, including:

1. How technology is revolutionizing our business.
2. Becoming a more vibrant member of the team, resulting in growing the branch.
3. Listening to clients' dreams and ensuring they get the best product options to help them.
4. Being an ambassador for growth, becoming the active dream builder that our clients need.

The experience is top rate. We have branch professionals from across the country in the session, so during break outs you will learn national best practices in frontline banking.

#### Program Agenda

- Expectations from top clients, whether they visit us at the branch or not
- Growing the client relationship through Onboarding and All-Aboarding
- Being able to uncover clients' dreams
- Establishing baseline standards
- Creating the ultimate client experience
- Great Cross-Selling: Asking great questions to get the client talking to discover dreams
- Data-driven decision making to convert more relationships into business
- Streamlining your work processes
- Gen Z and Millennials: managing relationships with coworkers and clients
- Develop leadership skills to wow your employer
- Action plan for skills transfer back to the job

#### 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.

#### Objective

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

#### 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.

#### 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.

# REGISTRATION FORM

## Wowing the Client – Live E-Classroom 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

1-Lesson: \$300

*Please check which date  
you would like to attend.*

### WINTER/SPRING

Feb. 25

### SUMMER

June 24

### FALL

Oct. 28

*For questions please contact  
MBA at 573-636-8151 or  
mba@mobankers.com.*

### E-Classroom Seminar Details

The seminar runs 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 person.

### Method of Payment \_\_\_\_\_

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 \_\_\_\_\_

### Three Ways to Register

 573-636-8151

 [mobankers.com](http://mobankers.com)

 Mail check payable to Missouri Bankers Association and form to:

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



### Missouri Bankers Association

207 E. Capitol Ave. ◊ Jefferson City, MO 65101  
573-636-8151 ◊ [mobankers.com](http://mobankers.com)