

***TODAY'S TELLER - THE BANKER:
MAKING A DIFFERENCE***

2017 DATES & LOCATIONS

June 12 - Huntingburg ♦ **June 13 - Lafayette**
June 14 - New Albany ♦ **June 15 - Batesville**

PROGRAM CONTENT

Your frontline employees are responsible for 80% or more of the interactions that customers have with the Bank. Having confident, informed, knowledgeable, and, most importantly, caring employees is a key lifeline for the Bank's growth.

Balancing regulatory compliance, providing exceptional service, and building profitable relationships are the three communication areas needed for today's frontline. This workshop focuses on the fundamental communication skills needed by the frontline in today's highly regulated, fast-paced, ever changing industry.

Participants leave the workshop with timely tools, job aids, and a reference notebook. Throughout the workshop, we will use "real-world" examples and exercises to aid participants with the challenges facing today's retail branches.

WHO SHOULD ATTEND?

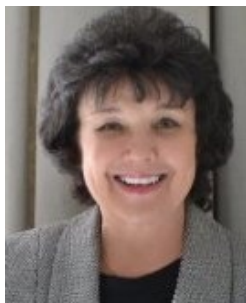
This workshop is especially designed for the retail team and those who work with and/or support the team. Each participant will receive a manual that will serve as a valuable reference tool.

All frontline personnel...tellers, call center personnel, customer service representatives, new account specialists...need to attend this program. Managers, assistant managers and trainers with ties to retail banking will not want to miss this program!

**OVERVIEW AND
LEARNING GOALS**

- The workshop will focus on proven methods for:
- Key Tips for Success as a Banker:
 - Learning and confidently communicating the latest regulatory and compliance "musts":
 - Preparing for new changes
 - Increased Focus on Customer Due Diligence
 - Identifying Current Frontline Fraud Schemes and Red Flags:
 - Debit Card Fraud
 - Id Theft
 - Elderly Financial Exploitation – Stranger and Closeness Scams
 - Wire Transfer and Check Fraud Schemes
 - Using "Winning Phrases" Instead of "Killer Phrases" to increase Customer Confidence
 - Avoid "Transferring" Customers
 - Plus Other Often-Used Phrases
 - WOWing Customers and Treating Customers as "GUESTS"
 - Welcoming Complaints and Turning "Lemons into Lemonade"

This seminar qualifies as part of the IBA Certified Teller Program. In order to maintain this professional certification, tellers are required to recertify annually.



About the Presenter - Dianne Barton, President, Performance Solutions, Inc.

Dianne Barton is President of Performance Solutions, Inc., (PSI), a training and consulting company that specializes in providing "real world" solutions to the key challenges facing banks today in attracting and building relationships with their customers. Her wide-range of training and consulting experience includes strategic planning facilitation, leadership development, regulatory compliance, and service and sales development.

Before starting Performance Solutions in 1983, she held senior positions with Bank South Corporation, the Internal Revenue Service, and the John H. Harland Company. Dianne is a graduate of Georgia State University and is on the faculty of several state banking schools.

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(Dept. # 47)
Please type or print legibly.
Copy this form for additional participants

Members of IBA

of People
1-4 \$89.00 each
5-9 \$84.00 each
10 or more \$79.00 each

Non-Members

of People
1-4 \$99.00 each
5-9 \$94.00 each
10 or more \$89.00 each

Confirmation & Cancellation Policy

The IBA will send confirmations as requested for its program. Please check the appropriate box and include a fax number on the registration form or contact Elizabeth Kilty at 317-387-9380 or you may e-mail: ekilty@indianabankers.org. Within three or more business days prior to the day of an educational program, no cancellation charge will be assessed. Within two days prior, 50% of the fee is assessed. Refunds are not provided for cancellations or absences which occur on the day of the program. Substitutions are welcome at any time.

Please check location you will attend:

- | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> June 12, 2017
Huntingburg Event Center
110 E. 14th Street
Huntingburg, IN 47542 | <input type="checkbox"/> June 13, 2017
Trails Banquet Facility
325 Burnetts Road
Lafayette, IN 47906 | <input type="checkbox"/> June 14, 2017
Best Western Plus
411 W. Spring Street
New Albany, IN 47150 | <input type="checkbox"/> June 15, 2017
Hillcrest Country Club
850 N. Walnut Street
Batesville, IN 47006 |
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Today's Teller - The Banker : Making a Difference Registration Form (Copy as needed.)

BANK _____

ADDRESS _____ City _____ Zip _____

PHONE _____ FAX _____

EMERGENCY # (In case of bad weather, etc.) _____

Attendees:

Agenda

5:30 p.m. Registration & Refreshments
6:00 p.m. Program Begins
9:00 p.m. Program Adjourns

Mail to: Indiana Bankers Association
6925 Parkdale Place
Indianapolis, IN 46254

Phone: 317-387-9380

Check Enclosed Charge my: VISA MasterCard

Fax: 317-387-9374

Name on Card

Account Number

Exp. Date

Please send credit card receipt to the email listed _____

Total payable to the IBA Found, Inc. \$ _____