

# Registration Form

Dept. #106

## Registration Pricing:

### IBA Members

\$850 - Full Program  
\$225 - Each Individual Session

### Non-Members

\$1700 - Full Program  
\$450 - Each Individual Session

*Fees include the program, materials, continental breakfast, lunch & refreshments.*

Participation in IBA programs is limited to members, associate members, and nonmembers from an eligible membership category at applicable member or nonmember rates.

## Confirmation / Cancellation Policy

The IBA will send confirmations as requested for its programs. Please check the appropriate box & include a fax number on the registration form. If you have questions, contact Elizabeth DeHaven via e-mail at [edehaven@indianabankers.org](mailto:edehaven@indianabankers.org) or by phone at 317-387-9380.

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 1 day prior or absences on the day of the program. Substitutions are welcome at anytime.

*Please check Full Series or the dates you wish to attend.*  Full Series

### First Quarter:

January 14, 2020

### Second Quarter:

April 14, 2020

### Third Quarter:

August 18, 2020

### Fourth Quarter:

November 17, 2020

Bank \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Cell # (in case of bad weather, etc.) \_\_\_\_\_

## Attendees

Name \_\_\_\_\_

Email \_\_\_\_\_

Name \_\_\_\_\_

Email \_\_\_\_\_

Name \_\_\_\_\_

Email \_\_\_\_\_

Total Amount Enclosed: \$ \_\_\_\_\_

Please Invoice Bank

Check Payable to IBA Foundation

Indiana Bankers Association  
8425 Woodfield Crossing Blvd Suite 155E  
Indianapolis, IN 46240

## Credit Card Information:

MasterCard

VISA

AMEX

Card Holder Name \_\_\_\_\_

Credit Card Number \_\_\_\_\_

Exp. Date \_\_\_\_\_

Yes, I am interested in the IBA Branch Management Certification Program

Non-Profit Org.  
U.S. POSTAGE  
PAID  
Indianapolis, IN  
Permit No. 221



IBA Foundation Inc.  
8425 Woodfield Crossing Blvd. Suite 155E  
Indianapolis, IN 46240

**Mailing Address Information**  
If the addressee listed on this brochure is no longer employed at the bank or the mailing address is incorrect, please update the information on our website at [www.indianabankers.org](http://www.indianabankers.org) or contact Michelle Long at 317-387-9380, or email: [mlong@indianabankers.org](mailto:mlong@indianabankers.org)

# Indiana Bankers Association



## Branch Management Series Updated & Revised for 2020

IBA Center for Professional Development  
Indianapolis, IN

# Branch Management Series Updated & Revised for 2020

**Dianne Barton, Instructor**

The Branch Management Series will focus on the critical success elements of managing and leading a performance focused sales and service team. Each workshop is designed either as a series or as a stand-alone, packaged full of checklists, job aids, case studies, examples, and "real world" situations. The Series provides a branch manager and the branch management team with current, proven solutions to managing a successful branch today. The Branch Management Series is designed for Retail Managers, Branch Managers, Assistant Branch Managers, Branch Manager Candidates and anyone responsible for the direction and development of a retail branch.

The Indiana Bankers Association is proud to offer the **updated** and **revised** Branch Management Series. More than ever before, today's branch management team is faced with a multitude of challenges and opportunities. Successful banks have branch leaders who are focused on motivating and engaging the team, building and increasing loyal customer relationships, mitigating risks through compliance and regulatory adherence, and accomplishing retail banking goals. In essence, the Branch Manager is the business manager. On-going education, training, and networking are essential in developing successful the branch management in today's ever-changing environment. The Branch Management Series is four-workshop sessions that may also be completed as stand-alone sessions.

## Key Elements of the Series

- Develop and Implement Retail Banking Business Plan
- Discover Individual Leadership and Management Styles
- Ensure Regulatory Compliance and Operational Adherence
- Mitigate Risks
- Grow the Retail Banking Branch
- Explore Proven Sales, Service, and Relationship Building Skills and Tools
- Motivate and Boost Employee and Team Success
- Manage Challenging Situations with Team Members and Customers
- Strengthen Communication and Day-to-Day Effectiveness
- Increase "Bench Strength" in the Branch
- Determine Critical Branch "Best Practices"

## Branch Management Certification Overview

Indiana Bankers Association is proud to offer the Branch Management Certification program. The workshops do not have to be taken in sequence in order to receive a certification. The four workshop sessions may also be completed as stand-alone sessions.

The benefits of this certification process include:

- An investment in developing "best practices" for your bank's branch network.
- An educational resource for training and career development.
- Recognition and opportunities for branch managers by completing these sessions.
- A foundation builder for banking schools.
- A commitment to successful, profitable, efficient and effective branches.

## What is the Process for Certification?

This is a comprehensive training program that focuses on three key components:

1. Completion of all four workshops in the Branch Management Series.
2. Successful completion of assignments after each of the four workshops.
3. Annually attending one live full day IBA workshop to re-certify each year.

## Target Audience

Retail Managers, Branch Managers, Assistant Managers, Head Tellers, Branch Manager Candidates and anyone responsible for the direction, supervision, and development of a retail branch.

## Certificate

Individual program participants will receive a Certificate of Completion. Persons attending all four programs and turning in all four homework assignments will earn the Indiana Bankers Association Branch Management Series Certification Plaque.

## Dress Code

Business casual attire is appropriate for these workshops.

## Workshop 1: New Year - New Start: Key Components for a Successful Year

**January 14, 2020**

Workshop 1 focuses on exploring the key components of a successful retail bank branch. Participants will leave with valuable tools and a "game plan" for 2020.

The agenda includes:

- Where Am I Today –Self-Assessment of Current Skills and Talents
- The Leadership Challenge for Today's Branch Management Team
  - Unleashing Your Leadership Abilities
- Communication Tools for Today's Branch Manager
- Understanding and Leading Today's Team of Different Generations
- Implementing the 3 C's to Excellence –plus one more
  - Coaching the Team to Engagement
- Getting the Right Person in the Right Seat - Recruiting a Winning Team
  - Employee Onboarding - First 90 Days
  - Discovering Learning Styles
- Defining the Performance Management Process for 2019
  - Developing Performance Expectations for the Team
- Top 10 Human Resource Must Knows for Today's Retail Managers
- Branch "Best Practices" and Action Planning

## Workshop 2: Leading, Developing, and Engaging the Team

**April 14, 2020**

Workshop 2 focuses on building the branch team. Managers learn proven ways to get team members engaged and challenging teams to exceptional performance. An "engaged employee" is one who is fully involved in, and enthusiastic about their work, and therefore will act in a way that furthers their bank's interests.

The agenda includes:

- Update of Lessons Learned – Skill Development
- Critical Skills for Today's Retail Bankers
- Balancing Today's Deposit Regulatory Requirements
- Security and Robbery Prevention for The Retail Banking Team
- Problem Solving
- Creating Employee Engagement
  - What is it? And Why do it?
  - Avoiding Common Problems
  - Identifying and Assessing the Engagement Drivers in the Retail Branch
- Finding More Time – Time Management Skills
  - Avoiding "Doing It All Yourself" – Getting the Team Onboard
- Meetings – New Alternatives to Meetings
- Branch "Best Practices" and Action Planning

## Workshop 3: Growing the Retail Branch

**August 18, 2020**

Workshop 3 focuses on the Branch Manager's Role as Sales & Service Leader. Managers learn to plan, motivate, and challenge the team to consistently provide exceptional service and meet the Branch's goals.

The agenda includes:

- The Retail Branch Performance Chart
  - Monitoring and Tracking Tools while Rewarding Results
  - Developing Sales & Service Standards
- How Today's Customer Experience is Changing
- Maximizing Your Bank's Competitive Value Edge
- Growing the Retail Branch from Within:
  - Selling is Helping the Customer
  - No More Product Pushing
  - Customer On-Boarding
  - Maximizing Customer Relationships – Bankers in Action
- Maximizing Universal Banking
- Networking Do's and Don'ts
- Retail Banking Business Development
  - Key Tools for Protecting Key Customers
  - Key Tools for Calling on Prospective Customers
- Branch "Best Practices" and Action Planning

## Workshop 4: Raising the Bar for Sustainable Growth

**November 17, 2020**

Workshop 4 focuses on maintaining superior performance. Managers learn new methods for communicating and raising the bar through the performance management process, team building, and leadership abilities. We explore how to keep a team motivated and focused on achieving organizational goals.

The agenda includes:

- Creating a Pathway for Sustainable Growth
- Conducting Performance Reviews – The Good, the Bad, and the Ugly
- Dealing with Personalities, Conflicts, and Challenges
- Generating Solutions to Retail Branch Challenges and Problems
- Leaders as Change Agents
- Getting the Best from Teams – Accountability Skills
  - The 10% Difference
  - Ten Steps to Building a Winning Team
- Mentoring and Creating Leaders
- Expanding the Leadership Challenge
- Energizing and De-Stressing Methods, Ideas, and Tools
- Influencing and Problem Solving for Change
- Celebrating Performance: Rewards and Recognition
- Review of the Self-Assessment – "And the Places We Will Go"
- Branch "Best Practices" and Action Planning

## Instructors

The Branch Management Series is presented by Performance Solutions, Inc. (PSI), a training and consulting company that specializes in providing solutions to the key challenges facing banks today in attracting, selling and servicing their customers. The Branch Management Series was originally introduced in 1983 and is continually revised and updated to meet the challenges and changes the banking industry experiences. PSI's training programs are designed to "close the gap" between the banks' needs and employees' skills. A philosophy of experiential learning and participant involvement in training led to the development of the company's "TELL-SHOW-DO" training method that is skill-based rather than theory. The training limits lecture discussions to a maximum of 7-9 minutes. PSI's training programs are described as energized, fast-paced, interactive, and results-focused.

Dianne Barton is the Founder & President of Performance Solutions, Inc. Dianne Barton is President of Performance Solutions, Inc. (PSI), a training and consulting company that specializes in providing solutions to the key challenges facing banks today in attracting and building profitable relationships with their customers. She has led the company's training and consulting services for over 35 years. Her training and consulting expertise in leadership development, regulatory compliance, retail growth strategies, strategic planning, and sales and service culture implementations is recognized as providing "real world solutions" by banks of all sizes. Before starting Performance Solutions, Inc. in 1983, Dianne held senior positions with Bank South Corporation, the Internal Revenue Service and the John H. Harland Company, where she introduced the highly acclaimed Officer Call Program. Dianne is a graduate of Georgia State University and is on the faculty of several state banking schools.

Trina McCoy, Senior Consultant and Facilitator, Performance Solutions, Inc. Trina McCoy started her career with a regional bank in 1999 as an in-store branch manager and later managed a traditional branch. Trina also served as a Regional Manager and City President where she assisted with the opening of over 30 branches and was responsible for managing, training and operational duties. She has also served on the Board of Directors for Junior Achievement. Trina enjoys spending time with her family, shopping, gardening and decorating.

## Locations and Schedules

The 2020 Branch Management Series will be held at the IBA Center for Professional Development, 8425 Woodfield Crossing Blvd. Suite 155E, Indianapolis, IN 46240. Registration & Continental breakfast will begin at 8:30 a.m., with classes running from 9:00 a.m. - 4:00 p.m.

The 2020 Branch Management Series dates are:

**January 14, 2020 - April 14, 2020 - August 18, 2020 - November 17, 2020**

**For additional information contact the IBA Education Department:**

Laurie Rees, Vice President, Education & Training  
Lrees@indianabankers.org

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