Indiana Bankers Association

Senior Retail Banking Forum

An Investment in Your Bank's Future!

This Senior Retail Banking Forum will provide a platform and opportunity for Retail Banking Officers to exchange ideas freely, dissect problems and discuss important issues with peers. You do not want to miss this opportunity!

Peer-to-peer sessions have proven very successful for IBA membership focus groups such as the CFO Forums, Human Resources Director Forum, Senior Lender Forums, and IT Officer & Operations Officer Forums. Based on feedback from the membership, this new Senior Retail Banking Forum will be no exception.

This hybrid event will be offered to attendees In-Person at the IBA Center for Professional Development or Via Zoom as a completely Live Interactive Program.

January 13, 2021   ●   May 4, 2021   ●   September 8, 2021

Benefits of the Forum...

- Improve your effectiveness as Retail Banking Officer

- Discuss current industry challenges with others in Retail Banking

- Form lasting relationships with other Retail Banking colleagues

- Solve your most pressing problems

- Grow professionally as well as personally

- Discuss with peers what works and what doesn't

How the Forum Works...

- The Forum will meet three times during the year

- Several topics will be discussed at each session. Participants are strongly encouraged to suggest topics of interest

- Forum participants get the benefit of working with seasoned facilitators on a cost-saving basis

- A binder based on Forum topics is compiled for each group member

Possible Forum Topics

- Building a Retail Banking Branch and Culture

- Current Challenges with Growing the Retail Branch

- Performance Management: Metrics, Scorecards, Contracting for Improvement

- Business Development: Increasing the Pipeline, Small Business Strategies, Protecting Key Customers

- Improving and Maximizing the Customer Experience

- Employee Engagement and Development

- Emerging Products and Services

- Generating Revenue: Value Added, Cross Selling, Non-Interest Income, On-Boarding and Re-Boarding

- Balancing Regulatory and Compliance with Generating Revenue

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Presenter: Dianne Barton

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, and the Internal Revenue Service. Dianne is a graduate of Georgia State University and is on the faculty of several state banking schools.

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Registration Fee for All Three Sessions:

The following fee is for three consecutive sessions and include the program materials, continental breakfast, lunch and refreshments.

Participants can choose to attend In-Person or Online.

$999 per IBA member

Please return this forum to: IBA Center for Professional Development, 8425 Woodfield Crossing Blvd, Suite 155E, Indianapolis, IN 46240

Name _____ E-mail Address _____

Bank _____

Address _____

City/State/Zip _____

Phone _____ Cell _____

Confirmation / Cancellation Policy

Due to our commitments, the price is inclusive of all three sessions. A full refund for the 3-session forum will be given for cancellations received prior to the first session. Any registrant who does not cancel before the first session will be billed the full registration fee and sent the materials. Substitutions are welcome at no additional charge.

Agenda
8:30 a.m. Registration
9:00 a.m. Program Begins
Noon Lunch
3:00 p.m. Program Adjourns

For More Information
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