

## Meet The Presenter

**Dianne Barton**, is the Founder and President of Performance Solutions, Inc. Her expertise in customer service, leadership, and sales & service culture development is recognized as leading edge by both national banks and community banks. Dianne's programs are designed to "close the gap" between the bank's needs & employees' skills. A philosophy of experiential learning and participant involvement in training led to the development of her "TELL-SHOW-DO" training method that is skill based rather than theory based. The training limits lecture discussions to a maximum of 7-9 minutes, relying on an active "hands on" approach by the participants.

**Trina McCoy** is the Senior Consultant and Facilitator, for Performance Solutions, Inc. (PSI), is a training and consulting company that has been a part of the banking community for over 35+ years. PSI specializes in providing solutions to the key challenges facing banks today in attracting and building relationships with their customers. 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.

## Fees & Locations

The following fees include the program, materials, continental breakfast, lunch and refreshments:

**\$225 IBA Member**

**\$155 Each Additional IBA Member**

100% Surcharge for NonMembers.

This seminar will be held on Tuesday, August 18, 2020 at the IBA Center for Professional Development, 8425 Woodfield Crossing Blvd. Suite 155E, Indianapolis, IN 46240.

## Special Accommodations

The IBA is committed to providing the best education in the best facility possible. To that end, we strive to accommodate any special needs bankers may have while attending our programs. If you need special accommodations or have dietary restrictions, please let us know.

## Confirmation / Cancellation

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

If you have questions, contact Elizabeth DeHaven at the IBA Office, 317-387-9380 or via email at [edehaven@indiana.bank](mailto:edehaven@indiana.bank).

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## Seminar

On-going education, training, and networking are essential in developing successful Branch Managers in today's ever-changing environment.

- Attend this IBA Seminar -

# Branch Management Series Session III Growing the Retail Branch

Tuesday  
August 18, 2020

**IBA Center  
for Professional  
Development  
Indianapolis**



Register Online  
[www.indiana.bank](http://www.indiana.bank)

## Program Overview

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.

## Topics To Be Discussed

- 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
- 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

## Agenda

8:30 a.m.	Registration & Continental Breakfast
9:00 a.m.	Program Begins
12:00 Noon	Lunch (included)
1:00 p.m.	Program Resumes
4:00 p.m.	Program Adjourns

## About The Branch Management Series

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.

### The benefits of this series process include:

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.

### 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

## Who Should Attend

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

## Growing the Retail Branch

(Dept. 106)  
*Please type or print legibly.  
Copy this form for additional participants.*

Name

Nickname for Badge

Bank/Firm

Address

City/State/Zip

Phone

Fax

Emergency # (In case of bad weather, etc.)

E-Mail

### Fees

#### Fees - Single Session

- ☐ \$225 each IBA Member
- ☐ \$450 each Nonmembers

#### Full Series

- ☐ \$850 each IBA Member
- ☐ \$1700 each Nonmembers

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

### Payment Information

Total payable to the IBA Foundation, Inc.

- ☐ Check Enclosed ☐ VISA ☐ MasterCard

Account Number

Exp. Date

- ☐ Confirmation ☐ Fax a map & list of Hotels

Return this form to:

**IBA Foundation Inc.**

8425 Woodfield Crossing Blvd

Suite 155E

Indianapolis, IN 46240

317-387-9380

Register online: [www.indianabankers.org](http://www.indianabankers.org)