

## FEES & LOCATIONS

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

Single Session	Full Series
\$225 IBA Member	\$850 IBA Member
\$450 Non-Members	\$1700 Non-Member

This seminar will be held on Tuesday, April 12, 2022 at the IBA Center for Professional Development, 8425 Woodfield Crossing, Blvd. Suite 155E Indianapolis, IN 46240.

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

## 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

## UPCOMING SESSIONS

**Session III: Growing the Retail Branch**  
August 16, 2022

**Session IV: Raising the Bar for Sustainable Growth**  
November 18, 2022

**Session I: New Year - New Start: Key Components for a Successful Year**  
January 2023 - Date TBD

## 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

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 at the IBA Office, 317-387-9380 or via email at [edehaven@indiana.bank](mailto:edehaven@indiana.bank)

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



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)

## Branch Management

This workshop focuses on building the team. Managers learn proven ways to get team members engaged and challenging teams to exceptional performance.

- Attend this IBA Seminar -

## Branch Management Series Session II

# Leading, Developing & Engaging the Team

*Tuesday*  
April 12, 2022

**IBA Center  
for Professional  
Development  
Indianapolis**



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

## PROGRAM OVERVIEW

Branch Management Series II 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.

## TOPICS TO BE DISCUSSED

- 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 - Finding Solutions
- Creating Employee Engagement
  - What is it? And Why do it?
  - Avoiding Common Challenges
  - 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
- Retail Banking "Best Practices" and Action Planning

## MEET YOUR PRESENTER

The Branch Management Series is presented by Performance Solutions, Inc., a bank training and consulting company that specializes in providing "real-world" solutions to the key challenges facing financial institutions today in developing the team and building profitable relationships.

**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 been guiding the company's training and consulting services for over thirty-five 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.

**Christie Dexler** is a Consultant with Performance Solutions, Inc., (PSI). Dexler has over 26 years of banking experience. Her wide-range of training and consulting experience includes customer service and retail management, leadership development, business development, and service and sales development.

## 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 manager is faced with a multitude of challenges and opportunities. Successful banks have Branch Managers 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 Branch Managers 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:

- 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
- Determine Critical Retail Banking "Best Practices"

## WHO SHOULD ATTEND

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

## LEADING, DEVELOPING & ENGAGING THE TEAM

(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 - Single Session

☐ \$225 each IBA Member

### Full Series

☐ \$850 each IBA Member

Participation in IBA programs is limited to members, associate members, and nonmembers from an eligible membership category at applicable member or non-member rates. 100% Surcharge applied to Non-members.

### Payment Information

Total payable to the IBA Foundation, Inc.

☐ Check Enclosed ☐ VISA ☐ MasterCard ☐ AMEX

Account Number

Exp. Date

Card Holders Name

Billing Zip Code

Return this form to:

**IBA Foundation Inc.**  
8425 Woodfield Crossing Blvd.  
Suite 155 E  
Indianapolis, IN 46240  
317-387-9380 Fax: 317-333-7169

### Image Use Policy:

Registration in IBA events constitutes an agreement to the IBA's use and distribution of the attendee's image or voice.

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