FRONTLINE BRANCH SERIES

INDIANA BANKERS ASSOCIATION

PRESENTED BY FOCUSED RESULTS

Upcoming Series!

LIVE VIRTUAL TRAINING

WHO SHOULD ATTEND?

Retail staff in the branches, or staff wanting to move into the branches. These professionals may be new hires, new to the field, or professionals with years of experience. They are the emerging professionals who want to become qualified to move laterally or forward in the organization.

SESSION DATES

Session 1 - May 15, 2024
Session 2 - June 26, 2024
Session 3 - July 24, 2024
Session 4 - August 28, 2024

TOPICS:

1. AN UNDERSTANDING OF THE CHALLENGES IN OUR INDUSTRY;
2. AN OPPORTUNITY TO LEARN AND ABOUT THE BEST UX- USER/CLIENT EXPERIENCE;
3. THE ABILITY TO PLAN FOR THE IMPACT OF TECHNOLOGY, ARTIFICIAL INTELLIGENCE, AND SELF-SERVICE ON YOUR FINANCIAL INSTITUTION AND EMPLOYEES
4. THE SKILLS TO BE AN AMBASSADOR FOR THE FINANCIAL INSTITUTION, AND BUILD YOUR PERSONAL NETWORK.

SERIES OVERVIEW

- With constant change facing financial institutions, transactions falling, and overall visits declining, we must find ways to engage our clients, new clients, and the community.
- We must find ways to deliver better client service in a more efficient manner.
- Frontline Branch Series is a 4-part, comprehensive series for beginning and new frontline professionals that focuses on creating a client-friendly environment on a budget.
- This series will focus on how we deliver the ultimate client experience, streamlining work processes to make things fun for employees and the client, resulting in the optimal institution of the future.
- The series includes group discussion and problem solving, fresh ideas through presentation, and a case-study.

SESSION OBJECTIVES

Topic 1: Culture Shifting in Financial Institutions
Focuses on the shift from order-taking to an engaged, advisory culture and the team issues faced when changing cultures.

Topic 2: Wowing the Client
Addresses the needs, wants, and expectations of the new, digital, and younger clients and employees.

Topic 3: Your Advisory Role
Presents opportunities for the business and employee to engage in activities and skills to drive results across the business for the foreseeable future.

Topic 4: Ambassadorship and Growth
Addresses critical skills necessary to make the employee more valuable in the company, and in the community at large.

MEET YOUR PRESENTER
JENNIE SOBECKI

Jennie Sobecki is Owner and CEO of Focused Results, a sales and marketing strategy, consulting, and training firm concentrating on results-driven process consulting and training experience in community banks and other financial institutions. An expert in designing and implementing sales efforts and processes, she designs solutions to drive top line growth through better utilization and training of existing sales forces, including sales management.

Jennie is a graduate of Indiana University and has a certificate in consulting services from Ball State University. Prior to joining Focused Results, she was Director of Sales and Marketing for a $3 billion bank holding company, Sales Manager for a high-performing mid-level Indianapolis bank, and Director of Corporate Training for a large Midwest insurance company.
A charismatic speaker and consultant, Jennie consults with numerous financial service organizations on revenue, sales, sales leadership, and organizational performance.

REGISTER

Frontline Branch Series

Registration fees include the program and training materials. Participation in IBA programs is limited to members, associate members and non-members from an eligible membership category at applicable member or non-member rates.
A 100% surcharge for non-members will be applied.

IBA Members / Associate Members
$800 for series

I would like to register for the following:
o Full Frontline Branch Series E-Classroom Program
o Culture Shifting in Financial Institutions (May 15)
o Wowing the Client (June 26)
o Your Advisory Role (July 24)
o Ambassadorship & Growth (August 28)

PROGRAM AGENDA

Log In and Registration - 8:45 am
Program Begins - 9 am
Program Adjorns - 12 pm

All times are in EST.

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Name
____
Bank/Firm

____
Address
____
City/State/Zip

____
Phone Fax
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Emergency # (In case of bad weather, etc.)
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E-Mail

Cancellation Policy
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 one day prior or on the day of the program. Substitutions are welcome at any time.

Questions:
The IBA will send confirmations as requested for its programs. Please check the appropriate box on the registration form. If you have questions, contact Elizabeth DeHaven at 317-387-9380 or via email at edehaven@indiana.bank.

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