

Retail Management Series

Dept. 106

Registration Fees

Registration fees include the program, materials, continental breakfast, lunch and refreshments each day. 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

\$1050 Series Member

\$275 Single Session

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.

Payment Information

Retail Management Series Registration (Please circle one)

Series Member Session I Session II Session III Session IV

Attendee Name _____

Email _____

Attendee Name _____

Email _____

Bank Name _____

Address _____

City, State, Zip _____

Phone _____

Please Send Invoice (Please circle one) VISA MasterCard AMEX

Total Amount Enclosed \$ _____

Cardholder Name _____

Credit Card Number _____

Expiration Date _____ CVV Code _____

Please register online at
indiana.bank.

IBA Foundation, Inc.
8425 Woodfield Crossing
Blvd.,
Suite 155E
Indianapolis, IN 46240
317-387-9380

Directions, maps and a list
of local hotels are available
on our website at
indiana.bank.

Agenda for Each Session

8:30 a.m. Registration and
Continental Breakfast
9:00 a.m. Program Begins
Noon Lunch
1:00 p.m. Program Resumes
4:00 p.m. Program Adjourns

Indiana Bankers Association is
proud to offer the Retail
Management Certification
program. The sessions 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.

RETAIL MANAGEMENT SERIES

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



**INDIANA
BANKERS
ASSOCIATION**

Program Overview

In association with Performance Solutions, Inc., Drexler Consulting, LLC is excited to again present one of our legacy programs, the Retail Management Series (formerly known as the Branch Management Series), updated for 2024.

The Retail Management Series is a four-part interactive learning series designed to provide a complete overview of management and leadership principles for Retail Managers serving in all roles of the retail banking line of business for the bank.

Benefits of the Series

- Interact, network, and learn from the experience other retail bankers
- Create and execute an effective retail business plan
- Implement a plan for your continued growth and development that is aligned with your manager's and bank's goals
- Effectively communicate vision, purpose, strategies, and consequences for your team
- Define and implement a culture of success
- Understand how to relate to others more effectively
- Build quality relationships and get important tasks done
- Effectively address underperformers
- Hire, promote, and retain the best
- Build client loyalty and grow the bank
- Streamline compliance requirements and retail operations
- Better address conflict with others and manage stress
- And much more!

Retail Management Certification Overview

To receive certification, attendees are required to:

- Attend all sessions
- Actively participate in all activities and exercises
- Complete four post-session assignments

Who Should Attend

All Retail Banking Managers at all levels of experience, as well as any banker who is being prepared for a future retail management role. Candidates for this training include Branch Managers, Customer Service Managers, Sales and Service Managers, Retail/Branch Operations Managers, Assistant Branch Managers, Head Tellers/Universal Bankers, Human Resource Managers, as well as Senior Retail Managers who are seeking new frameworks and tools for developing their teams.



Meet Your Presenters

Christie Drexler is the Owner of Drexler Consulting, LLC, a financial services consulting and training business focused on developing purpose-driven, competent, servant leaders in all roles of banking. In association with Performance Solutions, Inc. and Dianne Barton, Christie has offered training and consulting services through Drexler Consulting, LLC, for the past three years.

Christie has twenty-six years of direct experience in the financial services industry, working for both community and large regional banks. Her experience has been expansive to include successfully navigating retail and commercial banking careers. She has served as Division President, Market President, Chief Credit Officer, Chief Retail Officer, and Regional Sales & Service Manager. Christie has a B.S. in Finance from Berry College and an MBA from Georgia College and State University. She is a passionate facilitator and coach who strives to live the values and leadership strategies she teaches in her training programs.

We are excited this year to also welcome Josh Collins to our team. He has twelve years of banking experience serving in various leadership roles in retail banking, human resources, and talent development. Josh's background includes developing and facilitating banking, customer service, and leadership and culture development training programs. He is a graduate of the University of Georgia and is SHRM-CP certified. Josh enjoys equipping and encouraging bankers to grow their personal skillsets and build strong teams and cultures to maximize results for themselves and the banks they serve.

Session I: Essentials of Leading a High Performing Team

The session lays out foundational management and leadership principles.

The agenda includes:

- Where Am I Today? Self-Assessment of Current Skills and Talents
- The Challenge of Leadership in Today's Retail Banking Environment
- Leading with Vision, Purpose, and Values
- Developing Your Business Plan
- Building a High Performing Culture
- Effective Communication Strategies
- Performance Management Tools for the New Workforce
- Business and Development Planning: Putting Learning to Action

January 17, 2024

Session II: Building, Engaging, and Developing the Team

This session focuses on hiring, motivating, and developing the retail banking team. Managers learn proven ways to engage team members and challenge them to exceptional performance.

The agenda includes:

- Hiring, Promoting, and Retaining "the Best"
- Effective Interviewing: The Legalities and Best Practices
- Getting the Right Person in the Right Seat
- Creating Team Member Engagement
- Key Needs and Motivations of Today's Workforce
- Coaching for Impact, Connection and Results
- Business and Development Planning: Putting Learning to Action

March 5, 2024

Session III: Serving with Excellence and Growing the Bank

The session focuses on the Retail Leader's role in building client loyalty and growing the bank.

The agenda includes:

- How Today's Customer Experience is Changing
- Building Client Loyalty in a New Age
- Leading a Culture Committed to Service and Growth
- Holding Productive Team Meetings
- Providing "WOW!" Service
- Deepening and Expanding Client Relationships
- Building Community and Networking for Results
- Business and Develop Planning: Putting Learning to Action

May 1, 2024

Session IV: Raising the Bar for Sustainable Growth

This session provides strategies for increasing the Retail Leader's operational and leadership effectiveness.

The agenda includes:

- Overcoming Obstacles in Plan Execution
- Streamlining Retail Operations, Compliance, and More
- Success and Time Management Strategies for the Overcommitted Banker
- Building Support Across the Bank
- Handling Conflict and Increasing Your Emotional Quotient
- Leading Through Planned and Unplanned Change
- Navigating the Team Through Crisis
- Business and Development Planning: Putting Learning to Action

July 9, 2024