# 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 - January 28, 2026
Session 2 - February 25, 2026
Session 3 - March 25, 2026
Session 4 - April 22, 2026

## 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.

# PROGRAM OVERVIEW

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.

# SERIES TOPICS

**Culture Shifting in Financial Institutions; January 28, 2026**
Focuses on the shift from order-taking to an engaged, advisory culture and the team issues faced when changing cultures.
**Participant Key Skill Transfers and Takeaways:**

- Maximizing performance in the branch, especially when it's not busy.
- Maximizing the frontline professional's own performance as an individual contributor on the branch team.

**Wowing the Client; February 25, 2026**
Addresses the needs, wants, and expectations of the new, digital, and younger clients and employees.
**Participant Key Skill Transfers and Takeaways:**

- Learning how to ask great client questions.
- Working with clients to identify goals and dreams.
- Selling appropriate products to actualize client dreams and goals

**Your Advisory Role; March 25, 2026**
Presents opportunities for the business and employee to engage in activities and skills to drive results across the business for the foreseeable future
**Participant Key Skill Transfers and Takeaways:**

- Learning how to recognize a sales cue and a buying signal.
- Learning how to leverage technology and social media as tools to help clients reach financial goals.

**Ambassadorship and Growth; April 22, 2026**
Addresses critical skills necessary to make the employee more valuable in the company, and in the community at large.
**Participant Key Skill Transfers and Takeaways:**

- Learning to leverage interactions away from the workplace to capture additional business.
- Learning to best represent the financial institution away from work.

# MEET YOUR PRESENTER
# JENNIE MITCHELL

Jennie Mitchell 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**
$250 per single session
$900 for series

**I would like to register for the following:**
o Full Frontline Branch Series E-Classroom Program
o Culture Shifting in Financial Institutions (Jan 28)
o Wowing the Client (February 25)
o Your Advisory Role (March 25)
o Ambassadorship & Growth (April 22)

### PROGRAM AGENDA

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

All times are in EST.

____________________________________________
Name
____________________________________________
Bank/Firm
____________________________________________
Address
____________________________________________
City/State/Zip
____________________________________________
Phone Fax
____________________________________________
Emergency # (In case of bad weather, etc.)
____________________________________________
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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