WOWING THE CLIENT

LIVE VIRTUAL TRAINING
PRESENTED BY FOCUSED RESULTS

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.

CHOOSE FROM 3 DATES

February 25, 2026
June 24, 2026
October 28, 2026

TOPICS:

1. LEARNING HOW TO ASK GREAT CLIENT QUESTIONS.
2. WORKING WITH CLIENTS TO IDENTIFY GOALS AND DREAMS.
3. SELLING APPROPRIATE PRODUCTS TO ACTUALIZE CLIENT DREAMS AND GOALS.

PROGRAM OVERVIEW

Our workshop on Wowing the Client covers the skills needed by frontline branch professionals as they care for clients and help them realize their financial dreams. We will explore the trends in banking today, including:

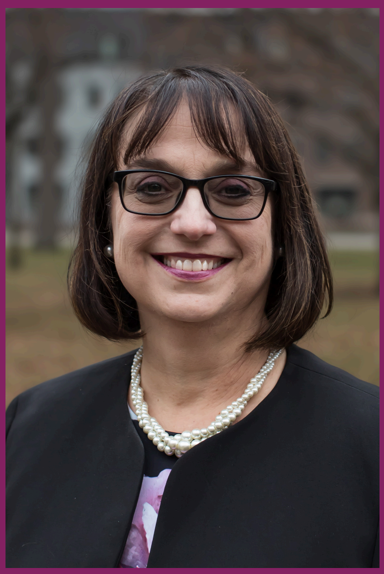
1. How technology is revolutionizing our business.
2. Becoming a more vibrant member of the team, resulting in growing the branch.
3. Listening to clients' dreams and ensuring they get the best product options to help them.
4. Being an ambassador for growth, becoming the active dream builder that our client need.

The experience is top rate. We have branch professionals from across the country in the session, so during breakouts you will learn national best practices in frontline banking. Please join us in your professional journey as you become the best of breed frontline branch professional in your market!

TOPICS

- Expectations from top clients, whether they visit us at the branch or not
- Growing the client relationship through
- Onboarding and All-Aboarding
- Being able to uncover clients' dreams
- Establishing baseline standards
- Creating the ultimate client experience
- Great Cross-Selling: Asking great questions to get the client talking to discover dreams
- Data-driven decision making to convert more relationships into business
- Streamlining your work processes
- Gen Z and Millennials: managing relationships with coworkers and clients
- Develop leadership skills to wow your employer
- Action plan for skills transfer back to the job

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.

PROGRAM AGENDA

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

All times are in EST.

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.

REGISTER

Dept. 8

IBA Members / Associate Members
$225 - Individual Session

Please Check Which Date You Would Like to Attend:

☐ **February 25**
☐ **June 24**
☐ **October 28**

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Name

____
Bank/Firm

____
Address

____
City/State/Zip

____
Phone

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

____
Email

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 Molly Gibbs at 317-387-9380 or via email at mgibbs@indiana.bank.