



**CENTER FOR  
FINANCIAL  
TRAINING<sup>SM</sup>**

**NORTH CENTRAL STATES**

# SEMINAR SERIES

**4-DAY**

## **Branch Manager Bootcamp: The Evolving Role of the Branch Manager**

**SESSION 1**

**January 28, 2019**  
Schaumburg, IL

**March 11, 2019**  
Madison, WI

**August 5, 2019**  
Grand Rapids, MI

**SESSION 2**

**January 29, 2019**  
Schaumburg, IL

**March 12, 2019**  
Madison, WI

**August 6, 2019**  
Grand Rapids, MI

**SESSION 3**

**January 30, 2019**  
Schaumburg, IL

**April 10, 2019**  
Madison, WI

**August 7, 2019**  
Grand Rapids, MI

**SESSION 4**

**January 31, 2019**  
Schaumburg, IL

**April 11, 2019**  
Madison, WI

**August 8, 2019**  
Grand Rapids, MI

**LOCATIONS**

Hampton Inn & Suites Schaumburg  
891 Plaza Dr., Schaumburg, IL 60173

Cambria Hotel & Suites  
5045 Eastpark Blvd; Madison, WI 53718

Hampton Inn & Suites Grand Rapids Downtown  
433 Dudley Place NE, Grand Rapids, MI 49503  
*(parking is included in registration fee)*

What does your branch have that alternate branch channels like mobile banking don't? The branch has you and your people. As the number of branch transactions continues to fall, financial institutions must reassess the role of the branch manager. They must invest in the manager, giving him or her the right people, tools, customer goals, and sales goals, and step back and watch the results change into a dynamic source of profitability.

This exciting, four-day bootcamp will focus on the next generation manager who will be leading the transition to customer relationship management, and to managing an active advisory environment for the customer to achieve financial goals. The next gen manager will be leading this vital transformation.

The program will focus on the critical skills and expectations that need to be developed to ensure that the next generation branch manager will exceed expectations and goals set for him or her. Participants will engage in discussions, small group activities, and skills practices to ensure that ideas are shared and learning is entertaining and adopted.

**WHO SHOULD ATTEND**

This bootcamp has been developed for branch managers, office managers, teller supervisors and others who are responsible for the performance of the branch.

**REGISTRATION**

The registration fee for the four part bootcamp of **\$950** includes program registration for one attendee at each session, instruction and materials, parking, breaks and lunches. The registration fee is by financial institution, and different individuals can be sent to different sessions. Individuals who attend all four sessions will be eligible for a certificate of completion for the Branch Manager Bootcamp. Registration for individual sessions is available for \$350/session/attendee. The registration fee includes program registration, session instruction and materials, parking, breaks and lunch.

**SCHEDULE**

**8:30am | Registration**  
**9:00am | Session Begins**  
**4:00pm | Adjournment**

**SPEAKER**

**JENNIE SOBECKI**  
*Owner of Focused Results, LLC*



CEO & Founder of Focused Results, a company concentrating in results-driven process consulting and training experience in community banks and financial institutions. An expert in designing and implementing sales efforts and processes, Ms. Sobecki designs solutions to drive top line growth through better utilization and training of existing sales forces, including sales management.

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

**HOTEL ACCOMMODATIONS**

Room blocks are set up at each location. A link will be provided in the confirmation for booking. Rooms in Madison are \$82/night plus tax; rooms in Grand Rapids are \$169/night plus tax, and rooms in Schaumburg are \$119/night plus tax. Room block rates expire 31 days prior to the start date of each bootcamp. After this date, rooms are subject to availability and at prevailing rates. Please book your room early, if necessary.

## Session 1 | Managing a Successful Branch

Monday, January 28 – Schaumburg  
Monday, March 11 – Madison  
Monday, August 5 – Grand Rapids

Branch Manager Session 1 focuses on the foundation skills of a Branch Manager.

Managers learn the key elements of managing a successful branch – selecting the team, staffing and scheduling, procedures, and building the team.

### Topics include:

- The Winning Branch Manager
- The Basic Principles of Leadership
- Defining the Performance Management Process
- Understanding Your Management and Leadership Style
- Coaching, Counseling, and Disciplining
- Orientation – The First 90 Days
- Creating a Fun Work Atmosphere
- Challenges We Face With Younger Employees
- Generational Approach to Motivation and Managing
- Scheduling and Staffing Today's Work Environment
- Key Positions, Key Procedures
- Top Five List/Bored Board
- Complete an Action Plan

## Session 2 | Leading Service Excellence

Tuesday, January 29 – Schaumburg  
Tuesday, March 12 – Madison  
Tuesday, August 6 – Grand Rapids

Branch Manager Session 2 focuses on “The Manager’s Role in Building and Leading an Effective Service and Sales Organization.” Managers will learn to plan and direct the team toward an effective business development effort.

### Topics Include:

- Vision Review
- Red Carpet Exercise
- Rhythms & Routines at the Branch
  - Introduction to Sales
  - Weekly Sales Meetings
  - Huddles
  - Mid-Week Clinics
- Mini Lesson: Listening for Opportunities
- Sales Leadership
- Discuss Challenges & Opportunities
- Complete an Action Plan



Please direct questions to Sandy Kuehn at CFT by calling (414) 332-6468 or email at [sandy@cftncs.org](mailto:sandy@cftncs.org).

Registration will begin at 8:30 a.m. for each location and session. The program will run from 9:00 a.m. to 4:00 p.m., with breaks at lunch, mid-morning and mid-afternoon.

**QUESTIONS | SCHEDULE >**

## Session 3 | Business Development

Getting Out of the Office

Wednesday, January 30 – Schaumburg  
Wednesday, April 10 – Madison  
Wednesday, August 7 – Grand Rapids

Branch Manager Session 3 focuses on the relationship building process to identify how to gain the trust of your customer, gain a larger share of wallet, and present solutions that solve your customers' needs. **Topics include:**

- Introductory Discussion
- Our Past Calling Successes & Challenges
- Getting Out of the Office
- Call Planning
- Gaining the Appointment
- The Initial Meeting
- Listening and Communicating How You Can Help
- Call Follow-Up
- The Value Proposition
- Skills Practice a Customer Call
- Complete an Action Plan

## Session 4 | Maintaining Superior Team Performance

Thursday, January 31 – Schaumburg  
Thursday, April 11 – Madison  
Thursday, August 8 – Grand Rapids

Branch Manager Session 4 focuses on maintaining superior performance. Managers learn to evaluate individual performance, build performance standards that blend with the bank's mission and vision. We will explore how to keep a team motivated and focused on achieving organizational goals.

**Topics include:**

- Conducting Performance Appraisals
  - Keys for a Successful Review
  - When Things Go Awry
- Managing Difficult Situations During a Review
- Mentoring the Team
- Performance & Development
- Managing Conflict
- Rebalancing the Culture
- Delegating to Build Your Team
- Recognition and Reward – Non-Monetary and Monetary
- Understanding the Challenges Facing the Financial Work Force of Today
- Complete an Action Plan

**“Jennie is fantastic, knowledgeable, experienced in the industry, interactive and fun!”**

**“Best trainer I've had in my 25+ years of banking. Seriously!”**

*– Past Participants of the Branch Manager Bootcamp*





# Branch Manager Series

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**Aug 8** Grand Rapids

## REGISTRATION FORM

Name 1		Title			
Branch Address (if different from below)		Email			
Location <input type="checkbox"/> Full Bootcamp - \$950 Schaumburg* <input type="checkbox"/> Full Bootcamp - \$950 Madison* <input type="checkbox"/> Full Bootcamp - \$950 Grand Rapids* *Substitutions allowed for different sessions	<b>Session 1 - \$350</b> <input type="checkbox"/> JAN 28 Schaumburg <input type="checkbox"/> MAR 11 Madison <input type="checkbox"/> AUG 5 Grand Rapids	<b>Session 2 - \$350</b> <input type="checkbox"/> JAN 29 Schaumburg <input type="checkbox"/> MAR 12 Madison <input type="checkbox"/> AUG 6 Grand Rapids	<b>Session 3 - \$350</b> <input type="checkbox"/> JAN 30 Schaumburg <input type="checkbox"/> APR 10 Madison <input type="checkbox"/> AUG 7 Grand Rapids	<b>Session 4 - \$350</b> <input type="checkbox"/> JAN 31 Schaumburg <input type="checkbox"/> APR 11 Madison <input type="checkbox"/> AUG 8 Grand Rapids	
Name 2		Title			
Branch Address (if different from below)		Email			
Location <input type="checkbox"/> Full Bootcamp - \$950 Schaumburg* <input type="checkbox"/> Full Bootcamp - \$950 Madison* <input type="checkbox"/> Full Bootcamp - \$950 Grand Rapids* *Substitutions allowed for different sessions	<b>Session 1 - \$350</b> <input type="checkbox"/> JAN 28 Schaumburg <input type="checkbox"/> MAR 11 Madison <input type="checkbox"/> AUG 5 Grand Rapids	<b>Session 2 - \$350</b> <input type="checkbox"/> JAN 29 Schaumburg <input type="checkbox"/> MAR 12 Madison <input type="checkbox"/> AUG 6 Grand Rapids	<b>Session 3 - \$350</b> <input type="checkbox"/> JAN 30 Schaumburg <input type="checkbox"/> APR 10 Madison <input type="checkbox"/> AUG 7 Grand Rapids	<b>Session 4 - \$350</b> <input type="checkbox"/> JAN 31 Schaumburg <input type="checkbox"/> APR 11 Madison <input type="checkbox"/> AUG 8 Grand Rapids	

## REGISTRATION FEE

Total Number of Registrants	Registration Fee \$950 (Full Series)* \$350 per person per session	Total Due to CFT \$
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## INSTITUTION INFORMATION

Institution			
Institution Address			
City	State	Zip	County
Business Phone			

**REFUND POLICY** | A refund is provided for written cancellations received by CFT fourteen (14) or more business days before the start of each session. All requests for cancellations or substitute registrations must be provided in writing to CFT at [sandy@cftncs.org](mailto:sandy@cftncs.org).

Depending upon program prerequisite requirements, another student from the financial institution may be registered as a replacement for the original student without penalty. A registrant who has not paid prior to cancelling will still be responsible for the above described fees and charges and will be invoiced accordingly.

**It's Easy to Register! Simply register online at [www.cftncs.org](http://www.cftncs.org) or fax or mail your completed form to:**

**CFT-NCS**  
 5215 N. Ironwood Rd.  
 Suite 103  
 Glendale, WI 53217 | FAX 414.332.6478

**WWW.CFTNCS.ORG**