



**CENTER FOR
FINANCIAL
TRAININGSM**

NORTH CENTRAL STATES

SEMINAR SERIES

4-DAY

The Emerging Banker School

DAY 1
Sept 25, 2018
Madison, WI

DAY 2
Sept 26, 2018
Madison, WI

DAY 3
Nov 6, 2018
Madison, WI

DAY 4
Nov 7, 2018
Madison, WI

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

With constant change facing community banks, branch transactions falling, overall visits declining, we must find ways to engage our customers, new customers, and the community. We must find ways to deliver better customer service in a more efficient manner.

The Emerging Banker School is a 4-day, comprehensive program for beginning, and new *retail* community bankers that focuses on creating a customer friendly environment on a budget. This school will focus on how we deliver the ultimate customer experience, streamlining work processes to make things fun for employees and the customer, resulting in the optimal bank of the future. The program includes group discussion and problem solving, fresh ideas through presentation, outside class assignments, and a case-study.

The Goals: **The Emerging Banker School** will provide retail bankers with:

1. An understanding of the challenges in community banking;
2. An opportunity to learn about the best UX- user/customer experience;
3. The ability to plan for the impact of technology, artificial intelligence, and self-service on the community bank and banker; and
4. The skills to be an ambassador for the bank, and build your personal network.

WHO SHOULD ATTEND

Bankers from the retail department within the bank. These retail bankers may be new hires, beginning bankers, or bankers with years of experience. They are the emerging retail bankers who want to become qualified to move laterally or forward in the organization.

REGISTRATION

The registration fee for the four part school of **\$950** includes program registration instruction and materials, breaks and lunches. Individuals who attend all four sessions will be eligible for a certificate of completion for The Emerging Banker School. Refunds will not be given for missed sessions; however a substitute may attend upon notice to the CFT office.

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

A room block has been set up at the Cambria Hotel & Suites for The Emerging Banker School, at a rate of \$82/night plus tax. The room block expires on September 10, 2018 for the September sessions and October 22, 2018 for the November sessions. After these dates, rooms are subject to availability and at prevailing rates. To secure your room at the discounted rate, please call 608-241-7070 and indicate you are part of the CFT (Center for Financial Training) room block.

CFT-NCs | 5215 N. Ironwood Rd., Suite 202, Glendale, WI 53217
P: 414.332.6468 F: 414.332.6478 | www.cftncs.org

Focuses on the shift from order-taking to an engaged, advisory culture and the team issues faced when changing cultures.

Topics include:

- Why community banks fail to compete
- Creating the advisory environment across the bank
- Growing the community bank appropriately
- Challenges in changing culture
- Analyzing staff performance across the bank
- Critical thinking – see the big picture
- The why's – learn the “why I am doing something” and the interworking of the job

Addresses the needs, wants, and expectations of the new, digital, and younger customers and employees.

Topics Include:

- Customer expectations from smart customers
- Creating the ultimate UX (user/customer experience)
- Data vs. data driven decision-making
- Streamlining your work processes
- iGen and millennial customers – trouble and opportunity ahead, must be able to manage relationships up and down with co-workers, and with customer relationships
- Develop leadership skills and wow your employer – they will take notice
- Team work and flexibility go both ways – employee and employer – there is no departmental – only one employer
- Assignment/Project to be completed before Day 3



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

Registration will begin at 8:30 a.m. for the first session. The program will run from 9:00 a.m. to 4:00 p.m. for each subsequent session, with breaks at lunch and throughout the morning and afternoons.

Presents opportunities for the bank and banker to engage in activities and skills to drive results across the bank for the foreseeable future.

Topics include:

- Present each team's Day 2 Assignment/Project findings to the class
- Bank products – WIIFM (what's in it for me?)
- The bank of the future – technology, artificial intelligence, and self service
- Transitioning your bank for the future
- Team selection and team rewards
- Social skills at events and during work time (i.e. lobby communication with customers)
- Social and business communication/etiquette
- Social media – what to share on Facebook, Twitter, etc.

Addresses critical skills necessary to make the banker more valuable in the bank, and in the community at large.

Topics include:

- Being an ambassador for your bank
- Dress in public: better to overdress than under dress
- Doing it right the first time – proof reading for accuracy
- Building your network
- Assessing strengths and weaknesses – yours and the bank's
- Community bank case study

“Understands the reality of our jobs and acknowledged that frontline employees are the face of the bank.”

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

– Past Participants





Emerging Banker School

SESSION 1
SEPT 25

SESSION 2
SEPT 26

SESSION 3
NOV 6

SESSION 4
NOV 7

REGISTRATION FORM

Name 1	Title
Branch Address (if different from below)	Email
Name 2	Title
Branch Address (if different from below)	Email
Name 3	Title
Branch Address (if different from below)	Email

REGISTRATION FEE

Total Number of Registrants	Registration Fee \$950 each	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 session one. All requests for cancellations or substitute registrations must be provided in writing to CFT at sandy@cftnecs.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.cftnecs.org or fax or mail your completed form to:

CFT-NCS
5215 N. Ironwood Rd.
Suite 202
Glendale, WI 53217 | **FAX 414.332.6478**

