

BUILDING A HIGH-PERFORMING RETAIL TEAM

SERIES

FACILITATOR

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7 FEBRUARY
4 APRIL
8 AUGUST
26 SEPTEMBER

IBA Center for Banking
Excellence, Springfield
OR
Live Streamed via Zoom
START 9AM

In today's competitive environment, banks must continuously improve and adapt to meet the needs of a changing workforce, new generations of clients, and rapidly evolving technology. This **RETAIL BANKING LEADERSHIP SERIES** meets the changing demands for retail banking leaders, new or seasoned bankers, to develop and strengthen their aptitude for the retail banking environment.

SESSION 1 / FEBRUARY 7

Essential Elements of the High-Performing Team

This session focuses on uncovering and building the key performance management disciplines of leading a high-performing retail banking team.

- Where Am I Today? Self-Assessment
- The Challenge of Leadership
- Leading with Vision, Purpose, and Values
- Developing a Branch Business Plan
- Building a High Performing Culture
- Leading a Team that Cares
- Defining the Performance Management Process
- Performance Management Tools for the New Workforce

SESSION 2 / APRIL 4

Leading, Developing, and Engaging the Team

This session focuses on motivating and developing the Retail Banking team. Managers learn proven ways to engage team members and challenge them to exceptional performance.

- The Branch Business Plan and Best Practices
- 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
- Coaching for Impact, Connection, and Results
- Key Needs and Motivation of Today's Workforce
- Motivating the Generations

SESSION 3 / AUGUST 8

Serving with Excellence and Growing the Retail Branch

This session focuses on the retail leader's role as a sales and service leader. Bankers learn networking and business development best practices, how to plan, motivate and challenge the team to provide exceptional service and meet the individual, the team consistently, and bank goals.

- The Branch Business Plan and Best Practices
- How Today's Customer Experience is Changing
- Leading a Sales and Service Culture
- Communicating with Impact
- Holding Productive Team Meetings
- Providing Service that Sells
- Creating Customer Loyalty in a New World
- Making Confident Business Development Calls
- Networking for Results

SESSION 4 / SEPTEMBER 26

Raising the Bar for Sustainable Growth

This final session focuses on maximizing results with minimal effort. Bankers learn new methods for building connections and partnerships with leaders, team members, and stakeholders across the organization. Learn to streamline operations to improve efficiency, accuracy, and reliability.

- Creating a Pathway for Sustainable Growth
- Leading through Planned and Unplanned Change
- Navigating the Team through Crisis
- Creating Connections and Building Support
- Developing Emotional Intelligence: Handling Conflict and Personalities
- Success Strategies for the Retail Banker



SIGN UP

FULL SERIES

Member \$995 pp
Nonmember \$1,665 pp

Substitutions acceptable

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