

7-8 MAY
11-12 JUNEIBA Center for Banking
Excellence, Springfield
OR
Live Streamed
9AM - 4PM

RETAIL BANKING LEADERSHIP SERIES

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. The Retail Banking Leadership Series meets the changing demands for retail banking leaders to develop and strengthen their aptitude for the retail banking environment.

SESSION 1

ESSENTIALS OF LEADING A HIGH-PERFORMING TEAM

- Where Am I Today? Self-Assessment
- The Challenge of Leadership in Today's Retail Banking Environment
- Leading with Vision, Purpose, and Values
- Developing Your Business Plan
- Building a High Performing Culture
- Effective Communication Strategies
- Performance Management Tools for the New Workforce
- Business and Development Planning

The session lays out foundational management and leadership principles.

SESSION 2

BUILDING, ENGAGING, AND DEVELOPING THE TEAM

- 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
- Key Needs and Motivations of Today's Workforce
- Coaching for Impact, Connection, and Results

This session focuses on hiring, motivating, and developing the retail banking team. Managers learn proven ways to engage team members and challenge them to exceptional performance.

SESSION 3

SERVING WITH EXCELLENCE AND GROWING THE BANK

- How Today's Customer Experience is Changing
- Building Client Loyalty in a New Age
- Leading a Culture Committed to Service and Growth
- Holding Productive Team Meetings
- Providing "WOW!" Service
- Deepening and Expanding Client Relationships
- Building Community and Networking for Results

The session focuses on the retail leader's role in building client loyalty and growing the bank.

SESSION 4

RAISING THE BAR FOR SUSTAINABLE GROWTH

- Overcoming Obstacles in Plan Execution
- Streamlining Retail Operations, Compliance, and More
- Success and Time Management Strategies
- Building Support Across the Bank
- Handling Conflict and Increasing Your Emotional Quotient
- Leading Through Planned and Unplanned Change
- Navigating the Team Through Crisis

This session provides strategies for increasing the retail leader's operational and leadership effectiveness.

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

FACILITATORS

Christie Drexler, Owner of Drexler Consulting, LLC
Josh Collins, Consultant with Drexler Consulting, LLC



Benefits of the Series

- Interact, network, and learn from the experience of other retail bankers
- Create and execute an effective retail business plan
- Implement a plan for your continued growth and development that is aligned with your manager's and bank's goals
- Effectively communicate vision, purpose, strategies, and consequences for your team
- Define and implement a culture of success
- Understand how to relate to others more effectively
- Build quality relationships and get important tasks done
- Effectively address underperformers
- Hire, promote, and retain the best
- Build client loyalty and grow the bank
- Streamline compliance requirements and retail operations
- Better address conflict with others and manage stress
- And much more!

Audience

All Retail Banking Managers at all levels of experience, as well as any banker who is being prepared for a future retail management role. Candidates for this training include Branch Managers, Customer Service Managers, Sales and Service Managers, Retail/Branch Operations Managers, Assistant Branch Managers, Head Tellers/Universal Bankers, Human Resource Managers, as well as Senior Retail Managers who are seeking new frameworks and tools for developing their teams.

