

BRANCH MANAGER BOOTCAMP

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TOPICS:

1 <• MANAGING A
SUCCESSFUL BRANCH

3 <• BUSINESS
DEVELOPMENT

2 <• LEADING SERVICE
EXCELLENCE

4 <• MAINTAINING SUPERIOR
TEAM PERFORMANCE

PROGRAM OVERVIEW

Invest in training your branch managers in growing their branch and their team.

- This exciting four-part series will focus on growing the branch manager and their team.
- This training teaches branch managers to grow the branch by helping their clients reach their financial dreams.
- Participants will engage in small group breakouts, where they interact with branch managers from across the country. Participants will learn national best practices and expand their network.

MEET YOUR PRESENTER



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.

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.

TOPIC 1: MANAGING A SUCCESSFUL BRANCH

OBJECTIVE:

Branch Manager Topic 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.

PARTICIPANT KEY SKILL TRANSFERS AND TAKEAWAYS:

- 1 LEARNING TO CREATE AN ENERGETIC AND PRODUCTIVE WORKPLACE.
- 2 LEARNING TO MANAGE THE BRANCH TEAM AND INTEGRATE TECHNOLOGY TO DRIVE ADDITIONAL BUSINESS.
- 3 DRIVING BUSINESS DEVELOPMENT EVEN WHEN THE BRANCH TRAFFIC IS SLOW.

PROGRAM AGENDA

- Branch Staffing Model – Layers are Collapsing
- How Technology is Revolutionizing Our Business
- Vision Review – Our Role as Dream Builders
- Defining the Performance Management Process
- Coaching, Counseling, and Disciplining
- Scheduling and Staffing in Today's Work Environment
- The Bored Board Concept – "Go To" List for Slow Times
- Creating a Fun Work Atmosphere
- Generational Approach to Communicating
- Challenges & Opportunities
- Complete an Action Plan for Skills Transfer back to the Job

TOPIC 2: LEADING SERVICE EXCELLENCE

OBJECTIVE:

Branch Manager Topic 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.

PARTICIPANT KEY SKILL TRANSFERS AND TAKEAWAYS:

- 1 DEVELOPING LEADERSHIP SKILLS TO GROW THE BRANCH.**
- 2 MASTERING AN UNDERSTANDING OF A LEADING A VIBRANT SERVICE AND SALES PROCESS IN A BRANCH ENVIRONMENT.**
- 3 LEARNING TO TRAIN THE BRANCH TEAM IN KEY LISTENING, REFERRING, AND SELLING SKILLS TO IMPROVE GROWTH.**

PROGRAM AGENDA

- Review Action Plan Successes from Past Session
- Vision Review – Hear the Dream; Pick the Product
- Red Carpet Exercise – Create a Memorable Experience
- Rhythms & Routines at the Branch
- Introduction to Dream Building (Helping clients by listening)
- Weekly Sales Meetings (What dreams did we find last week? How did we change a life?)
- AM and PM Huddles (Driving energy at the beginning and end of each day)
- Mid-Week Clinics (Brief gatherings with a learning topic facilitated by subject matter experts)
- Service and Sales Leadership – Identifying the challenges to expect when driving a service and sales culture at the branch
- Discuss Challenges & Opportunities
- Complete an Action Plan for Skills Transfer back to the Job
- TOOLKIT: Mini Lesson: Listening for Opportunities – Learn how to get the branch staff to listen and refer so we help our clients save money, make money, save time, & find convenience and security.

TOPIC 3: BUSINESS DEVELOPMENT

OBJECTIVE:

Branch Manager Topic 3 focuses on the relationship building process to identify how to gain the trust of your client, gain a larger share of wallet, and present solutions that solve your clients' needs.

PARTICIPANT KEY SKILL TRANSFERS AND TAKEAWAYS:

- 1 MASTERING PRE CALL PLANNING.
- 2 LEARNING TO CALL VIRTUALLY OR IN-PERSON ON THE RIGHT (MOST PROFITABLE) CLIENTS AND PROSPECTS.
- 3 BUILDING RELATIONSHIPS WITH PRODUCTIVE REFERRAL SOURCES.

PROGRAM AGENDA

- Introductory Discussion: Our Role in Growing the Branch
- Review Action Plan Successes from Past Session
- Our Past Calling Successes & Challenges
 - The Value Proposition
- Call Planning on Our Most Profitable Clients
- Gaining the Virtual or In-Person Appointment
- Planning for a Quality Encounter
 - Determining Lead Officers and Call (Individual or Joint) Strategy
 - Plan What to Have With You during the Call
 - Plan Bridging and Introductory Comments
- The Initial Meeting
 - Listening and Communicating How You Can Help
 - Making a Recommendation and Asking for the Business
 - Earning Referrals
- Call Follow-Up
 - Expand Your Notes to Capture the Call
 - Calendar Follow Up Activities
 - Assess the Call
- Discussing an Upcoming Client Call
- Discussing Challenges & Opportunities
- Complete an Action Plan for Skills Transfer back to the Job
- **TOOLKIT:** Forms for use back on the job

TOPIC 4: MAINTAINING SUPERIOR TEAM PERFORMANCE



OBJECTIVE:

Branch Manager Topic 4 focuses on maintaining superior performance. Managers learn to evaluate individual performance and build performance standards that blend with the company's mission and vision.

PARTICIPANT KEY SKILL TRANSFERS AND TAKEAWAYS:

1

WINNING MOTIVATIONAL STRATEGIES.

2

LEARNING BEST PRACTICES IN EMPLOYEE DEVELOPMENT, PERFORMANCE IMPROVEMENT, AND EMPLOYEE RECOGNITION.

PROGRAM AGENDA

- Review Action Plan Successes from Past Session
- Conducting Performance Appraisals
 - Discuss the Formal Appraisal Process at Your Company
 - Look at the Steps in Conducting a Performance Appraisal
 - Review a Sample Performance Appraisal Written by Branch Managers
 - What to Do When Things Go Awry
 - Managing Difficult Situations During a Review
- Managing Conflict
 - Structured Intervention
- Rebalancing the Culture
- Delegating to Build Your Team
- Mentoring the Team
- Performance & Development
- Recognition and Reward – Non-Monetary and Monetary
- Understanding the Challenges Facing the Financial Work Force of Today
- Program Summary
- Complete a Final Action Plan to Grow the Branch