

# BRANCH MANAGER BOOTCAMP

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## TOPICS:



**MANAGING A  
SUCCESSFUL BRANCH**



**BUSINESS  
DEVELOPMENT**



**LEADING SERVICE  
EXCELLENCE**



**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

- The new reality of thin staffing in the branches
- Technology is revolutionizing our business
- 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 as a "Go To" List for Slow Times
- Creating a fun work atmosphere
- Generational approach to communicating
- Complete an action plan for skills transfer back on 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

- Our vision is to help our clients achieve their financial dreams so they live a better life.
- 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
- Complete an action plan for skills transfer back to the Job

  

- **BONUS 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
- Our Past Calling Successes and 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
- Complete an action plan for skills transfer back on the job.
- **BONUS TOOLKIT: Customer Contact Management Form** for immediate 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

- 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
  - Engaging in 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