Branch Manager Bootcamp

The Evolving Role of the Branch Manager

Want to grow your total assets in excess of 20% year-over-year? Wish to grow your deposit base by more than 20%? Then consider an investment in training your Branch Managers in our Branch Manager Bootcamp!

What does your branch have that alternate branch channels and non-bank competitors don't? The branch has you and your people. As the number of branch transactions continues to fall, community banks and credit unions must reassess the role of the branch manager. Companies must invest in the manager, giving him or her the right people, tools, client goals, and sales goals, and step back and watch the results change into a dynamic source of profitability.

This exciting, four-part series will focus on the next generation manager who will be leading the transition to client relationship management, and to managing an active advisory environment for the client to achieve financial goals. The next gen manager will be leading this vital transformation.

The program will focus on the critical skills and expectations that need to be developed to ensure that the next generation branch manager will exceed expectations and goals set for him or her. Participants will engage in small group breakouts called PODs where they work with branch managers from across the country! They will learn national best practices and expand their network!

Who should attend?

New and experienced Branch Managers, Assistant Branch Managers, Teller Supervisors, Lead Frontline Professionals, and any professional aspiring to lead the team in a retail branch.

Managing a Successful Branch

<u>OBJECTIVE</u>

Branch Manager Part 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.

<u>Participant Key Skill Transfers to Take Away:</u>

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

Leading Service Excellence

OBJECTIVE

Branch Manager Part 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 to Take Away:

1. Developing leadership skills to grow the branch.
2. Mastering an understanding of 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: The following meetings take less than 1 hour per week to facilitate, and they positively impact the other 39 hours to increase business development activities by all team members:
    - 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 provide our clients the benefits they are seeking from us: save money, make money, save time, and provide convenience and security

Business Development

OBJECTIVE

Branch Manager Part 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 to Take Away:

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

Maintaining Superior Team Performance

OBJECTIVE

Branch Manager Part 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 to Take Away:

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