Registration Form

Dept. #106

Registration Pricing:

IBA Members
$850 - Full Program
$225 - Each Individual Session

Non-Members
$1700 - Full Program
$450 - Each Individual Session

Fees include the program, materials, continental breakfast, lunch & refreshments.

Participation in IBA programs is limited to members, associate members, and nonmembers from an eligible membership category at applicable member or nonmember rates.

Confirmation / Cancellation Policy

The IBA will send confirmations as requested for its programs. Please check the appropriate box & include a fax number on the registration form. If you have questions, contact Elizabeth Kilty via e-mail at ekilty@indianabankers.org or by phone at 317-387-9380.

Within three or more business days prior to the day of an educational program, no cancellation charge will be assessed. Within two days prior, 50% of the fee is assessed. Refunds are not provided for cancellations1 day prior or absences on the day of the program. Substitutions are welcome at anytime.

Please check Full Series or the dates you wish to attend. ☐ **Full Series**

First Quarter:
☐ **January 16, 2018**

Second Quarter:
☐ **April 17, 2018**

Third Quarter:
☐ **August 21, 2018**

Fourth Quarter:
☐ **November 27, 2018**

Bank_____

Address_____

City/State/Zip_____ State _____ Zip _____

Phone_____ Cell # *(In case of bad weather, etc.)* _____

Attendees

Name_____

Email_____

Name_____

Email_____

Name_____

Email_____

Total Amount Enclosed: $ _____

☐ Please Invoice Bank

☐ Check Payable to IBA Foundation
Indiana Bankers Association
8425 Woodfield Crossing Blvd Suite 155E
Indianapolis, IN 46240

Credit Card Information: ☐ MasterCard ☐ VISA

Card Holder Name

_____

Credit Card Number_____

Exp. Date_____

☐ Yes, I am interested in the IBA Branch Management Certification Program

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INDIANA BANKERS ASSOCIATION

IBA Foundation Inc.
8425 Woodfield Crossing Blvd. Suite 155E
Indianapolis, IN 46240

Mailing Address Information
If the addressee listed on this brochure is no longer employed at the bank or the mailing address is incorrect, please update the information on our website at www.indianabankers.org or contact Michelle Long at 317-387-9380, or email: mlong@indianabankers.org

Indiana Bankers Association

Branch Management Series

Updated & Revised for 2018

IBA Center for Professional Development
Indianapolis. IN

Branch Management Series
Updated & Revised for 2018

Dianne Barton, Instructor

The Branch Management Series will focus on the critical success elements of managing and leading a performance focused sales and service team. Each workshop is designed either as a series or as a stand-alone, packaged full of checklists, job aids, case studies, examples, and "real world" situations. The Series provides a branch manager and the branch management team with current, proven solutions to managing a successful branch today. The Branch Management Series is designed for Retail Managers, Branch Managers, Assistant Branch Managers, Branch Manager Candidates and anyone responsible for the direction and development of a retail branch.

The Indiana Bankers Association is proud to offer the **updated** and **revised** Branch Management Series. More than ever before, today's branch management team is faced with a multitude of challenges and opportunities. Successful banks have branch leaders who are focused on motivating and engaging the team, building and increasing loyal customer relationships, mitigating risks through compliance and regulatory adherence, and accomplishing retail banking goals. In essence, the Branch Manager is the business manager. On-going education, training, and networking are essential in developing successful the branch management in today's ever-changing environment. The Branch Management Series is four-workshop sessions that may also be completed as stand-alone sessions.

Key Elements of the Series

- Develop and Implement Retail Banking Business Plan
- Discover Individual Leadership and Management Styles
- Ensure Regulatory Compliance and Operational Adherence
- Mitigate Risks
- Grow the Retail Banking Branch
- Explore Proven Sales, Service, and Relationship Building Skills and Tools
- Motivate and Boost Employee and Team Success
- Manage Challenging Situations with Team Members and Customers
- Strengthen Communication and Day-to-Day Effectiveness
- Increase "Bench Strength" in the Branch
- Determine Critical Branch "Best Practices"

Branch Management Certification Overview

Indiana Bankers Association is proud to offer the Branch Management Certification program. The workshops do not have to be taken in sequence in order to receive a certification. The four workshop sessions may also be completed as stand-alone sessions.

The benefits of this certification process include:

- An investment in developing "best practices" for your bank's branch network.
- An educational resource for training and career development.
- Recognition and opportunities for branch managers by completing these sessions.
- A foundation builder for banking schools.
- A commitment to successful, profitable, efficient and effective branches.

What is the Process for Certification?

This is a comprehensive training program that focuses on three key components:

1. Completion of all four workshops in the Branch Management Series.
2. Successful completion of assignments after each of the four workshops.
3. Annually attending one live full day IBA workshop to re-certify each year.

Target Audience

Retail Managers, Branch Managers, Assistant Managers, Branch Manager Candidates and anyone responsible for the direction and development of a retail branch.

Certificate

Individual program participants will receive a Certificate of Completion. Persons attending all four programs and turning in all four homework assignments will earn the Indiana Bankers Association Branch Management Series Certification Plaque.

Dress Code

Business casual attire is appropriate for these workshops.

Workshop 1: New Year - New Start: Key Components for a Successful Year

January 16, 2018

Workshop 1 focuses on exploring the key components of a successful retail bank branch. Participants will leave with valuable tools and a "game plan" for 2018.

The agenda includes:

- Where Am I Today –Self-Assessment of Current Skills and Talents
- The Leadership Challenge for Today's Branch Management Team
  - Unleashing Your Leadership Abilities
- Communication Tools for Today's Branch Manager
- Understanding and Leading Today's Team of Different Generations
- Implementing the 3 C's to Excellence –plus one more
  - Coaching the Team to Engagement
- Getting the Right Person in the Right Seat - Recruiting a Winning Team
  - Employee Onboarding - First 90 Days
  - Discovering Learning Styles
- Defining the Performance Management Process for 2018
  - Developing Performance Expectations for the Team
- Top 10 Human Resource Must Knows for Today's Retail Managers
- Branch "Best Practices" and Action Planning

Workshop 2: Leading, Developing, and Engaging the Team

April 17, 2018

Workshop 2 focuses on building the branch team. Managers learn proven ways to get team members engaged and challenging teams to exceptional performance. An "engaged employee" is one who is fully involved in, and enthusiastic about their work, and therefore will act in a way that furthers their bank's interests.

The agenda includes:

- Update of Lessons Learned – Skill Development
- Critical Skills for Today's Retail Bankers
- Balancing Today's Deposit Regulatory Requirements
- Security and Robbery Prevention for The Retail Banking Team
- Influencing and Problem Solving for Change
- Problem Solving and Change Management
- Creating Employee Engagement
  - What is it? And Why do it?
  - Avoiding Common Problems
  - Identifying and Assessing the Engagement Drivers in the Retail Branch
- Finding More Time – Time Management Skills
  - Avoiding "Doing It All Yourself" – Getting the Team Onboard
- Meetings – New Alternatives to Meetings
- Branch "Best Practices" and Action Planning

Workshop 3: Growing the Retail Branch

August 21, 2018

Workshop 3 focuses on the Branch Manager's Role as Sales & Service Leader. Managers learn to plan, motivate, and challenge the team to consistently provide exceptional service and meet the Branch's goals.

The agenda includes:

- The Retail Branch Performance Chart
  - Monitoring and Tracking Tools while Rewarding Results
  - Developing Sales & Service Standards
- How Today's Customer Experience is Changing
- Maximizing Your Bank's Competitive Value Edge
- Growing the Retail Branch from Within:
  - Selling is Helping the Customer
  - No More Product Pushing
  - Customer On-Boarding
  - Maximizing Customer Relationships – Bankers in Action
- Maximizing Universal Banking
- Networking Do's and Don'ts
- Retail Banking Business Development
  - Key Tools for Protecting Key Customers
  - Key Tools for Calling on Prospective Customers
- Branch "Best Practices" and Action Planning

Workshop 4: Raising the Bar for Sustainable Growth

November 27, 2018

Workshop 4 focuses on maintaining superior performance. Managers learn new methods for communicating and raising the bar through the performance management process, team building, and leadership abilities. We explore how to keep a team motivated and focused on achieving organizational goals.

The agenda includes:

- Creating a Pathway for Sustainable Growth
- Conducting Performance Reviews – The Good, the Bad, and the Ugly
- Dealing with Personalities, Conflicts, and Challenges
- Generating Solutions to Retail Branch Challenges and Problems
- Leaders as Change Agents
- Getting the Best from Teams – Accountability Skills
  - The 10% Difference
  - Ten Steps to Building a Winning Team
- Mentoring and Creating Leaders
- Expanding the Leadership Challenge
- Energizing and De-Stressing Methods, Ideas, and Tools
- Celebrating Performance: Rewards and Recognition
- Review of the Self-Assessment – "And the Places We Will Go'

Branch "Best Practices" and Action Planning

Instructor

The Branch Management Series is presented by Performance Solutions, Inc., a training & consulting company that specializes in providing solutions to the key challenges facing community banks today in attracting, selling & servicing their customers. The Branch Management Series was originally introduced in 1983 and is continually revised and updated to meet the challenges and changes the banking industry experiences.

Dianne Barton is the Founder & President of Performance Solutions, Inc., a training and consulting company that specializes in providing solutions to the key challenges facing community banks today in attracting, selling & servicing their customers. As a former banker, her service, which includes a broad scope including strategic planning, leadership and management development, regulatory & compliance implementations, retail growth strategies, and sales & service culture development, is recognized as "real world solutions" by both regional banks and community banks.

Dianne's training programs are designed to "close the gap" between the bank's needs and employees' skills. A philosophy of experiential learning and participant involvement in training led to the development of her "TELL-SHOW-DO" training method that is skill based rather than theory based. The training limits lecture discussions to a maximum of 7-9 minutes, relying on an active "hands on" approach by the participants.

Locations and Schedules

The 2018 Branch Management Series will be held at the IBA Center for Professional Development, 8425 Woodfield Crossing Blvd. Suite 155E, Indianapolis, IN 46240. Registration & Continental breakfast will begin at 8:30 a.m., with classes running from 9:00 a.m. - 4:00 p.m.

The 2018 Branch Management Series dates are:

January 16, 2018 - April 17, 2018 - August 21, 2018 - November 27, 2018

For additional information contact the IBA Education Department:

Laurie Rees, Vice President, Education & Training
Lrees@indianabankers.org
Elizabeth Kilty, Education Coordinator
ekilty@indianabankers.org

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