

Head Teller: How to Supercharge Your Team, Referrals and Performance — Including Your Own



- 
- The branch of the future and the role of the teller
 - Boosting the level of customer satisfaction and loyalty
 - Getting your staff to listen
 - Defining outstanding performance for your staff
 - Coaching to improve and enhance performance
 - A bit of cross-selling
 - Using performance appraisal as a coaching tool
 - Progressive discipline process



June 7, 2017
Shazam Education Center
Springfield

Course Introduction

No matter what the title, you play a key role. You manage a retail team that is the face — the image, the impression, the brand — of your financial institution. Your team is expected to handle the personal and business finances of your customer, cross-sell and refer appropriately, all with a smile and without mistake.

This program gives the skills to improve team productivity, through coaching, motivating and accountability. You will enhance your skills in how to reduce boredom, stop procrastination and poor customer service, and supercharge branch performance that increases staff professionalism, member satisfaction and member loyalty.

Who Should Attend?

Head tellers, branch managers, training staff and others who manage or work the front line would benefit from this program

Key Topics

- The branch of the future and the role of the teller
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- Getting your staff to listen
- Defining outstanding performance for your staff
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- A bit of cross-selling
- Using performance appraisal as a coaching tool
- Progressive discipline process

What Others Have Said:

"I loved Jennie's energy and enthusiasm. She had great insight, was very knowledgeable, and the information she presented was very applicable to our bank."

Amy Davis, New Accounts Representative
Farmers State Bank, Elmwood

"Jennie did a fantastic job! She helped to determine the right questions to ask our clients."

Connor Adams, Personal Banker
Bank of Springfield

"Jennie has a good picture of the challenges faced by banks and is passionate about helping bankers overcome those challenges.

Lisa Reece, VP, Head of Retail Banking
State Bank of Waterloo

"I thought that Jennie took the time to thoroughly explain each subject and make sure everyone understood the information presented. While her seminar was fast paced, we were able to cover many topics."

Lauren Dixon, Universal Banker
First National Bank & Trust Co., Clinton

About the Presenter

Jennie Sobecki is co-owner of Focused Results, a company concentrating in results-driven process consulting and training experience in community banks. An expert in designing and implementing sales efforts and processes, Sobecki designs solutions to drive top line growth through better utilization and training of existing sales forces, including sales management.

Sobecki is a graduate of Indiana University, Bloomington and has a certificate in consulting services from Ball State University, Muncie, IN. Prior to joining Focused Results, Sobecki was director of sales and marketing for a \$3-billion-bank holding company, sales manager for a high-performing mid-level bank, and director of corporate training for a large Midwest insurance company. A charismatic speaker and consultant, Sobecki consults with numerous financial service organizations on revenue, sales, sales leadership and organizational performance.



Jennie Sobecki

Registration Fees

Fees include hand-out materials, refreshment breaks and lunch. An income-tax deduction may be allowed for educational expenses undertaken to maintain or improve professional skills.

Cancellation Policy

Registrants cancelling two days prior to each seminar receive 100% refund; one day prior, 50%; the day of the seminar, no refund. **All cancellations must be made in writing prior to the seminar day. Invoices and training materials will be sent to all "no shows."**

CBAI MEMBER

One person	\$265
Two or more from same banking institution	\$245 each

**PROSPECTIVE-MEMBER

One person	\$465
Two or more from same banking institution	\$445 each

CDD members receive a 10% discount.

****Only financial institutions/firms eligible for CBAI membership.**

Please note that CBAI does not issue confirmations, with the exception of on-line registrations, but feel free to call Association headquarters to confirm your registration.

Registration Form

Head Teller: How to Supercharge Your Team, Referrals and Performance -- Including Your Own

Shazam Education Center: CBAI Headquarters, Springfield
June 7, 2018

Please Print

Name of Bank _____

Address _____

City, State, Zip _____

Tel. No. _____

Name/Title _____

E-Mail _____

Name/Title _____

E-Mail _____

I have special needs, please contact me before the seminar.

Please select your payment method.

Check Enclosed Check in Mail
 Pay at Door Credit Card*

****If you are paying by credit card, please fill out the following information. (Visa, MasterCard & Discover accepted).***

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Billing Address of Card _____

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Mail it in:
CBAI Education Department
901 Community Drive
Springfield, IL 62703-5184



Fax it in:
(217) 585-8738



Call it in:
(800) 736-2224 (Illinois only)
(217) 529-2265



Click it in:
www.cbai.com

Dates and Locations

June 7, 2018

Shazam Education Center
CBAI Headquarters
901 Community Drive
Springfield, IL
217/529-2265

Agenda

Registration begins at 8:30 a.m.
The seminar runs from 9 a.m. to
approximately 4 p.m. A continental
breakfast & lunch are provided.

CBAI is a registered Public Accounting Continuing Professional Education (CPE) provider of the Illinois Dept. of Financial and Professional Regulation.

For More Information

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Melinda McClelland, Vice President
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