

# Listening for Opportunities Train~the~Trainer Program



- Characteristics of an Exceptional Trainer
- Training Vs. Education
- What Does a Training Module Include?
- What to do Before, During & After the Training
- Facilitating the Meeting
- Following Up/Support
- Rules of Engagement
- Overview of the Listening for Opportunities Training Module
- Feedback & Review of the Presentations
- Planning the Schedule Back at the Bank
- Discuss Challenges & Opportunities
- Complete Your Action Plan
- “Listening for Opportunities” Program to Teach to Employees at the Bank



May 24, 2017  
Shazam Education Center  
Springfield

# Course Introduction

Our branch team is the “face of the bank” and touches more customers than anyone else at the bank. They have the best opportunity to listen to our customers and help them build their financial dreams! By the end of this train-the-trainer seminar, bankers are prepared to train “Listening for Opportunities” to frontline bankers back at the bank. These trainers will understand their role in providing an exciting, non-threatening training experience for their co-workers back on the job. They skills practice, conduct a brief training exercise, and receive performance feedback. This program allows bankers to then train co-workers how to recognize customer dreams, goals, or even issues, and translate that into actionable steps to help customers make and save money, time, or be financially safe and secure. The morning program is devoted to learning how to train for impact along with a review of the “Listening for Opportunities” content. The afternoon focuses on transferring skills to the job for employees, test presentations by your trainers, and feedback from the instructor.

## Who Should Attend?

Bankers who would be identified as trainers, HR officers, supervisors, head tellers, branch managers, or anyone who is considered a trainer in the bank would benefit from this training.

## Key Topics

### Morning Agenda -- How to Train Your Employees

- Introductions
- Characteristics of an Exceptional Trainer
- Training Vs. Education
- What Does a Training Module Include?
- What to do BEFORE the Training
- What to do DURING the Training
- Getting Things Started
- Facilitating the Meeting
- What to do AFTER the Training
- Following Up/Support
- Rules of Engagement
- Overview of the Listening for Opportunities Training Module
- Participants Skills Practice a Portion of the “Listening for Opportunities” Lesson
- Feedback & Review of the Presentations
- Planning the Schedule Back at the Bank
- Discuss Challenges & Opportunities
- Complete Your Action Plan

### Afternoon Agenda -- “Listening for Opportunities” Program to Teach to Your Employees

- Service is the Key
- Critical Role of the Front-line Employee
- Branch Traffic
- Vision Review
- No Product Pushing!
- Engaging the Customer in Conversations
- Listening for the Opportunity to Serve
- Major Expenses Throughout Life (Life Cycle Events)
- Identify How Our Bank's Products Meet Those Needs
- E Banking -- the Product of Choice
- Referral Practices to Capture Opportunities
- Drafting an Action Plan

# About the Presenter

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Jennie Sobecki is Co-Owner of Focused Results, LLC, a sales and marketing strategy, consulting, and training firm, concentrating in results-driven process consulting and training experience in community banks and FI's. 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 and has a certificate in consulting services from Ball State University. 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.

# Registration Fees

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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 the Association headquarters to confirm your registration.**



# Registration Form

## LISTENING FOR OPPORTUNITIES TRAIN-THE-TRAINER PROGRAM MAY 24, 2017

Please Print

Name of Bank \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Tel. No. \_\_\_\_\_

Name/Title \_\_\_\_\_

E-Mail \_\_\_\_\_

Name/Title \_\_\_\_\_

E-Mail \_\_\_\_\_

\_\_\_\_ I have special needs or food allergies, 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).**

Name as It Reads on Card \_\_\_\_\_

Company Name on Card \_\_\_\_\_

Billing Address of Card \_\_\_\_\_

Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Security Code \_\_\_\_\_

## Dates and Locations

May 24, 2017

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 and lunch are provided.

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

## For More Information

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Visit us on-line at [www.cbai.com](http://www.cbai.com)

