

Universal Banker Skills



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- The Changes in Branch Banking
 - Vision Review
 - The Benefits Customers Seek from Us
 - Getting the Customer to Talk
 - Gathering Information Versus Taking Orders
 - Building Relationships
 - Branch Traffic
 - Listening for an Opportunity to Serve
 - Matching Products to Customer Needs
 - E Banking Benefits & Challenges
 - Referral Form Overview
 - Referral Procedures to Capture Opportunities
 - Financial Profile
 - Making Service Phone Calls
 - My Action Plan for Performance Improvement



October 5, 2017
Shazam Education Center
Springfield

Course Introduction

The role of the personal/universal banker has been enhanced with the advancement of technology, but the customer emphasis has changed to relationship from transactions. Universal bankers used to enjoy a steady stream of customers at our branches. Now, most of us have peak periods when customers crowd our lobbies, but there are very real lulls during the business day that we need to fill with meaningful activity.

The level of professionalism and commitment for us as universal bankers has never been as high as is required in today's banking environment. We're ready for the challenge, and this lesson highlights the journey of our continued skills development as we serve our customers and grow the bank.

Who Should Attend?

Customer Service Representatives, Branch Managers, training staff and others who manage or work the front line would benefit from this program

Key Topics

- The Changes in Branch Banking
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We will offer a free one-hour webinar overview for managers after the training session on Friday, October 6, from 1:00 - 2:00 p.m. This provides an executive overview of the curriculum along with specific coaching ideas to support the skills transfer from the training back onto the job.

About the Presenter

Jennie Sobecki, co-owner of Focused Results, a company concentrating in results-driven process consulting and training experience in community banks and financial institutions leads this program. 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

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

UNIVERSAL BANKER SKILLS

October 5, 2017: Shazam Education Center: CBAI Headquarters,

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).***

Name as It Reads on Card _____

Company Name on Card _____

Billing Address of Card _____

Card Number _____ Exp. Date _____

Security Code _____



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

October 5, 2017

Shazam Education Center
CBAI Headquarters,
Education Center
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 by the Illinois Dept. of Financial and Professional Regulation.

For More Information

Tracy McQuinn, Sr. Vice President
Valerie Johnston, Vice President
Melinda McClelland, Vice President
Rebecca Ridgeway & Jennifer Nika,
Administrative Assistants
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& Special Events
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