

Winning Retail Marketing & Sales Strategies for Community Banks

March 27, 2018



Our Mission. Community Banks.

SHAZAM Education Center, CBAI Headquarters, Springfield, IL

Course Introduction

We keep trying to kill the branch, yet 85% of your retail accounts are still opened in a branch. This fast-paced, one day seminar focuses on the retail strategies and tactics that drive customers AND prospects into the branch.

We use real-life examples to increase traffic and avoid killing your budget, allowing you to truly offer recommendations that directly affect the financial success of those you serve.

Who Should Attend?

Chief banking officers, branch managers, marketing officers, sales officers and managers, retail-product managers, new-accounts managers, universal bankers, business development officers, and any other bankers directly affecting retail sales results would benefit from attending this program.

About the Presenter

What Others Have Said:

"I received numerous ideas that can be implemented easily and effectively."

Matt Merboth,
President/CEO
Spring Valley City Bank

"Duane went above and beyond to explain topics and answer questions."

Christina Scates,
Branch Manager
Grand Rivers Community
Bank, Grand Chain

"Duane is very knowledgeable and very articulate."

Rick Collings, SVP
Flanagan State Bank,
Bloomington

"I received great ideas and different approaches. Duane was excellent."

Corey Tedford,
Commercial Loan Officer
Ottawa Savings Bank

Duane F. Sobecki is the CEO of Focused Results, LLC, a sales strategy, consulting, and training firm. A renowned authority in sales strategy and strategic-market segmentation, Sobecki provides actionable business development, expansion, marketing, and planning strategies to financial institutions.

Sobecki specializes in helping financial-service providers to better segment important markets, and direct sales and marketing strategies at those key segments to ensure revenue and profit growth. Sobecki is the principal writer of Rebound Banking, a twice-monthly look at how banks can take advantage of the improving economy, and the author of numerous reports and booklets on key market-segment development.

Sobecki holds a B.S. from the Kelley School of Business at Indiana University, Bloomington, and has a certificate in management planning from the University of Illinois – Chicago. A charismatic speaker, Sobecki has led seminars and workshops on sales and marketing, and management at numerous universities and corporations – and bank associations in the Midwest. With more than 30 years of process consulting and training, Sobecki frequently lectures for a number of universities in their executive education programs.

Key Topics

- Gaining the internal support for branch efforts
- Driving traffic going “old school”
- Bank referral programs that work
- Contests do work
- Using social media to drive traffic
- I've got them in, now what?
 - Cross-selling without conflict
 - Profiling in a hurry
 - Onboarding to hold your gains
- Right analytics, right results
- Electronic banking strategies
- and More!



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.*

Registration Form

WINNING RETAIL MARKETING AND SALES AND STRATEGIES FOR COMMUNITY BANKS

MARCH 27, 2018

Please Print

Name of Bank _____

Address _____

City, State, Zip _____

Tel. No. _____

Name/Title _____

E-Mail _____

(E-mail addresses are required for registration).

Name/Title _____

E-Mail _____

(E-mail addresses are required for registration).

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 accepted).*

Name as It Reads on Card _____

Company Name on Card _____

Billing Address of Card _____

Card Number _____ Exp. Date _____

Three-Digit Security Code _____



Click it in:
www.cbai.com



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
(217) 529-2265

Date and Location

March 27, 2018

SHAZAM Education Center
CBAI Headquarters
901 Community Drive
Springfield, IL 627003
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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