## BRANCH MANAGER BOOTCAMP

PRESENTED BY FOCUSEDRESULTS.BIZ

#### **TOPICS:**









## PROGRAM OVERVIEW

#### Invest in training your branch managers in growing their branch and their team.

- This exciting four-part series will focus on growing the branch manager and their team.
- This training teaches branch managers to grow the branch by helping their clients reach their financial dreams.
- Participants will engage in small group breakouts, where they interact with branch managers from across the country. Participants will learn national best practices and expand their network.

### MEET YOUR PRESENTER



Jennie Mitchell is Owner and CEO of Focused Results, a sales and marketing strategy, consulting, and training firm concentrating on results-driven process consulting and training experience in community banks and other financial institutions.

Prior to joining Focused Results, she was Director of Sales and Marketing for a \$3 billion bank holding company, Sales Manager for a high-performing mid-level Indianapolis bank, and Director of Corporate Training for a large Midwest insurance company.

# TOPIC 1: MANAGING A SUCCESSFUL BRANCH



#### **OBJECTIVE:**

Branch Manager Topic 1 focuses on the foundation skills of a Branch Manager.

Managers learn the key elements of managing a successful branch: selecting the team, staffing and scheduling, procedures, and building the team.

#### PARTICIPANT KEY SKILL TRANSFERS AND TAKEAWAYS:

- LEARNING TO CREATE AN ENERGETIC AND PRODUCTIVE WORKPLACE.
- LEARNING TO MANAGE THE BRANCH TEAM AND INTEGRATE TECHNOLOGY TO DRIVE ADDITIONAL BUSINESS.
- DRIVING BUSINESS DEVELOPMENT EVEN WHEN THE BRANCH TRAFFIC IS SLOW.

- Branch Staffing Model Layers are Collapsing
- How Technology is Revolutionizing Our Business
- Vision Review Our Role as Dream Builders
- Defining the Performance Management Process
- Coaching, Counseling, and Disciplining
- Scheduling and Staffing in Today's Work Environment
- The Bored Board Concept "Go To" List for Slow Times
- Creating a Fun Work Atmosphere
- Generational Approach to Communicating
- Challenges & Opportunities
- Complete an Action Plan for Skills Transfer back to the Job

## TOPIC 2: LEADING SERVICE EXCELLENCE

#### **OBJECTIVE:**

Branch Manager Topic 2
focuses on:
"The Manager's Role in
Building and Leading an
Effective
Service and Sales
Organization."

Managers will learn to plan and direct the team toward aneffective business development effort.

#### PARTICIPANT KEY SKILL TRANSFERS AND TAKEAWAYS:

- DEVELOPING LEADERSHIP SKILLS TO GROW THE BRANCH.
- MASTERING AN UNDERSTANDING OF A LEADING A VIBRANT SERVICE AND SALES PROCESS IN A BRANCH ENVIRONMENT.
- LEARNING TO TRAIN THE BRANCH TEAM IN KEY LISTENING, REFERRING, AND SELLING SKILLS TO IMPROVE GROWTH.

- Review Action Plan Successes from Past Session
- Vision Review Hear the Dream; Pick the Product
- Red Carpet Exercise Create a Memorable Experience
- Rhythms & Routines at the Branch
- Introduction to Dream Building (Helping clients by listening)
- Weekly Sales Meetings (What dreams did we find last week? How did we change a life?)
- AM and PM Huddles (Driving energy at the beginning and end of each day)
- Mid-Week Clinics (Brief gatherings with a learning topic facilitated by subject matter experts)
- Service and Sales Leadership Identifying the challenges to expect when driving a service and sales culture at the branch
- Discuss Challenges & Opportunities
- Complete an Action Plan for Skills Transfer back to the Job
- TOOLKIT: Mini Lesson: Listening for Opportunities Learn how to get the branch staff to listen and refer so we help our clients save money, make money, save time, & find convenience and security.

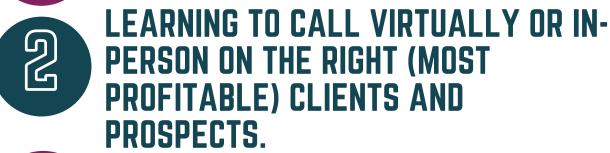
## TOPIC 3: BUSINESS DEVELOPMENT



Branch Manager Topic 3 focuses on the relationship building process to identify how to gain the trust of your client, gain a larger share of wallet, and present solutions that solve your clients' needs.

#### PARTICIPANT KEY SKILL TRANSFERS AND TAKEAWAYS:







- Introductory Discussion: Our Role in Growing the Branch
- Review Action Plan Successes from Past Session
- Our Past Calling Successes & Dur; Challenges
  - The Value Proposition
- Call Planning on Our Most Profitable Clients
- Gaining the Virtual or In-Person Appointment
- Planning for a Quality Encounter
  - o Determining Lead Officers and Call (Individual or Joint) Strategy
  - Plan What to Have With You during the Call
  - Plan Bridging and Introductory Comments
- The Initial Meeting
  - Listening and Communicating How You Can Help
  - Making a Recommendation and Asking for the Business
  - Earning Referrals
- Call Follow-Up
  - Expand Your Notes to Capture the Call
  - Calendar Follow Up Activities
  - Assess the Call
- Discussing an Upcoming Client Call
- Discussing Challenges & Discussing Challenges & Discussing Challenges
- Complete an Action Plan for Skills Transfer back to the Job
- TOOLKIT: Forms for use back on the job

# TOPIC 4: MAINTAINING SUPERIOR TEAM PERFORMANCE

## OBJECTIVE:

Branch Manager Topic 4
focuses on maintaining superior
performance. Managers learn to
evaluate individual
performance and build
performance standards that
blend with the company's
mission and vision.

#### PARTICIPANT KEY SKILL TRANSFERS AND TAKEAWAYS:



WINNING MOTIVATIONAL STRATEGIES.



LEARNING BEST PRACTICES IN EMPLOYEE DEVELOPMENT, PERFORMANCE IMPROVEMENT, AND EMPLOYEE RECOGNITION.

- Review Action Plan Successes from Past Session
- Conducting Performance Appraisals
  - Discuss the Formal Appraisal Process at Your Company
  - Look at the Steps in Conducting a Performance Appraisal
  - Review a Sample Performance Appraisal Written by Branch Managers
  - What to Do When Things Go Awry
  - Managing Difficult Situations During a Review
- Managing Conflict
  - Structured Intervention
- Rebalancing the Culture
- Delegating to Build Your Team
- Mentoring the Team
- Performance & Development
- Recognition and Reward Non-Monetary and Monetary
- Understanding the Challenges Facing the Financial Work Force of Today
- Program Summary
- Complete a Final Action Plan to Grow the Branch