

Universal Banker Certification Program #2

Part 2 of a 4 Part Series
February 11, 2022 ❖ Florida Hotel, Orlando

With constant change facing community banks, transactions falling and overall visits declining, we must find ways to engage our customers, new customers and the community. We must find ways to deliver better customer service in a more efficient manner. This Universal Banker Certification Program is a four-part, comprehensive program for community bankers that focuses on creating a customer friendly environment on a budget. This program will focus on how we deliver the ultimate customer experience, streamlining work processes to engage employees and customers alike, resulting in the optimal bank of the future. The program includes group discussion and problem solving, fresh ideas through presentation and a case-study.

Part 2 Highlights - Wowing the Customer

Part two of this four part series addresses the needs, wants and expectations of the new, digital and younger customers and employees.

- ❖ Expectations from top customers, whether they visit the branch or not.
- ❖ Growing the client relationship - Onboarding and All-Aboarding
- ❖ Dream building insights - dreams you are finding through client encounters
- ❖ Establishing baseline service standards - hear the dream, pick the product
- ❖ Creating the ultimate UX (user/customer experience) - Being a brand advocate
- ❖ Great cross selling - asking great questions to get the customer talking to discover dreams
- ❖ Data vs. data driven decision-making - you know the bank's products and how they help your customers. Discover ways to convert more relationships into business.
- ❖ Streamlining your work processes - red carpet exercise
- ❖ iGen and millennial customers – trouble and opportunity ahead, must be able to manage relationships up and down with co-workers, and with customer relationships
- ❖ Develop leadership skills and wow your employer – they will take notice
- ❖ Team work and flexibility go both ways – employee and employer – there is no departmental – only one employer

Participant Key Skill Transfers to Take Away

- ❖ Learning how to ask great customer questions
- ❖ Working with Customers to identify goals and dreams
- ❖ Selling appropriate products to actualize dreams and goals

Program Goals

The goal of the Universal Banker Certification Program is to provide bankers with:

- ❖ An understanding of the challenges in community banking;
- ❖ An opportunity to learn and about the best user/customer experience;
- ❖ The ability to plan for the impact of technology, artificial intelligence, and self-service on the community bank and banker; and
- ❖ The skills to be an ambassador for the bank while building your personal network.

Value of This Program

Participants who attend all four sessions will be awarded a certificate of completion from the Florida Bankers Association. This certificate recognizes an employee's commitment to improving their knowledge and provides additional rewards including:

- ❖ A more educated staff means your bank improves its ability to compete in the marketplace.
- ❖ Customers and staff appreciate informed leadership, and notice the difference.
- ❖ Certification permits employees to take greater responsibility for their own training and education, to develop their own careers, which may lead to future advancement opportunities.

The four parts of this program do not need to be taken in sequence. Start the program with any session.

Who Should Attend

This program is appropriate for bankers from any department within the bank. These bankers may be new hires, beginning bankers or bankers with years of experience. They are the emerging bankers who want to become qualified to move laterally or forward in the organization.

Meet the Speaker - 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 financial institutions. An expert in designing and implementing sales efforts and processes, Jennie designs solutions to drive top line growth through better utilization and training of existing sales forces, including sales management. She is a graduate of Indiana University and has a certificate in consulting services from Ball State University. 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 bank, and director of corporate training for a large Midwest insurance company.

Schedule of Events

8:30 a.m. - 9:00 a.m.	Registration
9:00 a.m. - 12:00 p.m.	Program
12:00 p.m. - 1:00 p.m.	Lunch
1:00 p.m. - 4:00 p.m.	Program

The program will begin promptly at 9:00 am

Date and Hotel Information

Call the hotel for current room rate and availability.

February 11, 2022

The Florida Hotel
1500 Sand Lake Road
Orlando, FL 32809
(407) 859-1500

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Register online at www.floridabankers.com or complete this form and send to Florida Bankers Association, 1001 Thomasville Rd, Suite 201, Tallahassee, FL 32303 or by fax to (850) 222-6338. Contact Pete Brokaw at (850) 701-3515 or pbrokaw@floridabankers.com with any questions concerning this event.

Registration Fees	Before <u>1/11/22</u>	After <u>1/11/22</u>
FBA Members.....	\$355.00	\$405.00
All Other Non- Member Institutions.....	\$710.00	\$810.00

Contact Person: _____ Title: _____
 Organization: _____ Email: _____
 Phone: _____ Ext. _____ Fax: _____
 Address: _____
 City: _____ State: _____ Zip: _____

List Registrants' Names

- 1) Name: _____ Order # (FBA Use): _____ Orlando
 Email: _____ Title: _____
- 2) Name: _____ Order # (FBA Use): _____ Orlando
 Email: _____ Title: _____
- 3) Name: _____ Order # (FBA Use): _____ Orlando
 Email: _____ Title: _____
- 4) Name: _____ Order # (FBA Use): _____ Orlando
 Email: _____ Title: _____

Method of Payment (check one)

Payment is required at time of submission to process registration. Approved refunds will be payable via FBA check.

MasterCard VISA American Express Discover

Credit Card Number: _____

Name on card: _____

Exp. Date: _____ CVV # _____

Billing Zip Code: _____ Total Amount Due: \$ _____

Cancellation and Refund Policy

In the event you are unable to attend a meeting, the FBA strongly encourages sending a substitution. Cancellations prior to four (4) weeks will be refunded minus a 10% processing fee. Cancellations 2-4 weeks prior to an event will be refunded minus a 25% processing fee. There are no refunds or credits for cancellations within two (2) weeks of an FBA event.