

Universal Banker Certification Program #3

Part 3 of a 4 Part Series
August 12, 2021 ❖ Zoom Video

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 3 Highlights - Your Advisory Role

Part three of this four part series presents opportunities for the bank and banker to engage in activities and skills to drive results across the bank for the foreseeable future.

- ❖ Bank products – what bank products do you use
- ❖ Growing the branch - the bored board concept
- ❖ Listening for opportunities - recognizing the sales cue or life cycle event and matching our bank’s products to help customers.
- ❖ Referral form and procedures to get the customer to the right banker for help
- ❖ The bank of the future – technology, artificial intelligence, and self service
- ❖ Transitioning your bank to meet emerging trends
- ❖ Team rewards - how does your team celebrate successes?
- ❖ Social skills at events and during work time - how do you interact with clients in the lobby? How do you make a positive impression representing the bank while away from work?
- ❖ Social and business communication/etiquette
- ❖ Social media – what to share on Facebook, Twitter, etc. Does it represent you well?

Participant Key Skill transfers to Take Away

- ❖ Learning how to recognize a sales cue and a buying signal
- ❖ Learning how to leverage technology and social media as tools to help customers reach financial 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 Sobeki 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

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



Universal Banker Certification Program #3

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>7/12/21</u>	After <u>7/12/21</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): _____ Zoom Video

Email: _____ Title: _____

2) Name: _____ Order # (FBA Use): _____ Zoom Video

Email: _____ Title: _____

3) Name: _____ Order # (FBA Use): _____ Zoom Video

Email: _____ Title: _____

4) Name: _____ Order # (FBA Use): _____ Zoom Video

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.