The following sessions have been developed specifically for community banking. They are designed to reach bank managers and leaders. The length of the presentations time can be adjusted to fit your event schedule.

### Developing Next Generation of Leaders In A Succession Culture

Organizations that consistently outperform their competitors employ effective industry practices supported by strong middle management teams. Leadership development and succession planning place a high priority on any company’s ability to leverage the talent in the middle of their organization. Using the analogy with an Oreo cookie (the good stuff is in the middle), this session focuses on simple techniques to engage middle managers, communicate with employees, set clear performance expectations and provide ongoing feedback.

Cultural change, improvements in communications, even overall staff morale can be influenced favorably by developing the core competencies of your middle managers. Develop managers that your employees will remember for a lifetime.

*Participants receive a snack pack of Oreo cookies to connect the presentation theme, message and experience.*

### Three Ways to Improve Your Strategic Planning

In addition to tips and best practices for effective business planning, this presentation examines three management tools that can be utilized to improve your bank’s planning activities. All three of the tools…employee engagement surveys, customer satisfaction surveys and action plan mapping will help planning teams improve the quality of their decisions and strategies.

Participants will receive sample surveys and industry research results to determine how similar projects would enhance their bank’s planning activities. The action plan mapping tools will help improve plan execution and related accountabilities for managers. The easy-to-use forms and implementation checklists make preparations for your survey projects and strategic plan implementation, easy and effective.
Every Circus Needs A Ringmaster

This session examines the challenges community bank directors and managers have identified as critical to success...organization design, leadership, support systems, management consensus and resource management. The challenges are connected to a circus theme to emphasize the importance of customer engagement. Add to those challenges a few additional distractions, like regulatory changes and technology and there are more than enough reasons to lose focus on optimum performance. Help your organization’s leadership team identify what must be done to build a foundation for sustainable success. Encourage your leaders to develop a vision for success and become active change agents to achieve the desired results. It all begins with leadership.

Participants receive either a package of animal crackers or a foam clown nose to connect the presentation theme, message and experience.

Settling The Boomer/Millennial Debate

Leadership development and succession planning place a high priority on any company’s ability to develop talent within their organization. We continue to hear stories from managers about the gap between Baby Boomers and Millennials. The Baby Boomers are managing based on performance practices that helped them achieve results. They apply those practices to the next generation of employees. After all, the Boomers produced success with those activities. The challenge is, Millennials may not see the benefits of adopting practices the Boomers found helpful. So, how do we build a work environment that is attractive to younger employees and productive for seasoned managers? This presentation focuses attention on three important ingredients to bridge the Boomer-Millennial gap...communication, engagement and rewards. The best solutions for your organization might be the ones you haven’t tried yet. This session, presented by a Baby Boomer and a Millennial, will examine challenges created by generational differences in the workforce.

Recipe For An Effective Sales Environment

Exceptional dining experiences begin with a great recipe. Your sales environment is the same. This presentation takes a recipe card approach to helping banks identify the critical ingredients that make sales environments more effective. Participants will receive a broad summary of what banks are doing today to compete for customers and build lifetime loyalty. But, the program doesn’t stop with an outline. The session will provide forms, checklists and practical applications that help simplify implementation no matter what stage of development the bank is addressing. Structure, measurement, accountability and support are defined and introduced as the foundations for successful development.

Today’s sales and service solutions require strategic thinking regarding staff resources, systems support, management structure, reward programs, training and much more. This presentation challenges bankers to look beyond traditional approaches to relationship development and pursue a future that begins with a customer-centric business model.
Converting Customer Satisfaction Into Customer Loyalty

Originally designed as an online seminar, this presentation helps financial industry professionals differentiate between having satisfied customers and having customers that are loyal. The program includes an examination of industry surveys to explore the level of satisfaction that exists between a financial institution and the clients they serve. Additionally, participants will hear about specific activities to embrace relationships and create an emotional tie with customers. Participants will leave the program with examples of customer satisfaction surveys they can use to conduct appropriate research with their customers. Plus, they will have a checklist of ideas and programs that will stimulate customer relationships and enhance long-term loyalty.

Building Your Brand On A Limited Budget

Proactively developing ways to fully utilize the physical and human resources of your organization is a challenge faced by all financial professionals. Balancing these resources so you can differentiate your brand from the myriad of competitors in your trade area is a significant challenge. This workshop is designed to help you identify the cost-effective ways to leverage your brand to a higher level of awareness.

Eight Habits of Successful Bank Managers

Developing better leadership skills and applying them effectively in the management process is the focus of this presentation. If you have been looking for a checklist of important management tips to improve your business development, bank management and marketing efforts, this session will help. Find out more about the dos and don'ts of bank management. Receive helpful hints for improving your planning process. It's all part of this informative look at ways to enhance your management of marketing activities.

Is Your Business Development A House of Cards?

Whether you have an existing officer call program or are planning to introduce some form of business development program this year, you will want to attend this informative presentation. The session will provide you with proven tools for designing and managing a successful program. The program includes materials and forms to help prepare an introduction plan, manage officer contact activities, report results and design effective reward systems.

Building A Referral Culture

Simply introducing a referral program doesn’t guarantee success. In order to be successful, referral programs must be easy-to-manage, credible, visible and focused. Does your referral program meet these standards? You can create employee and manager accountability with a properly structured referral program. You will also benefit from the relationship potential of reaching your best source of future business…your customers. This online session will give you the program structure and guidelines you need to develop and introduce an effective referral program in 60 days. It’s easy, fast and effective.