***2020 Fall Marketing***

**Bank Manager in The Now Economy**

We have “The Now Economy” and must learn to maneuver effectively so we grow our business all the while continuing to meet emerging client needs. Bankers all over the bank are delving into the PPP program, answering questions, and processing loans that they never anticipated being involved with. We know that we must continue to help our clients meet their needs outside of the PPP program, and we need to consider how to forge ahead for the remainder of this year and into the next when hopefully our US economy begins to recover.

We play a key role, both as coach and as a business development professional in banking. This seminar series focuses on how the bank manager can take care of the needs of today, while keeping an eye on the future. It’s challenging and exciting to be a banker today, knowing we have the responsibility to grow our team and listen to our clients’ needs and position our products and services to help our clients achieve their dreams.

No matter what the title, you play a key role. You manage a team that is the face – the image, the impression, the brand – of the bank. Your team is expected to handle the personal and business finances of your customers, cross-sell, and refer appropriately, all with a smile and without mistake. This program gives you the skills to improve team productivity – through coaching, motivating, and accountability. You will enhance your skills in how to supercharge bank performance that increases staff professionalism, customer satisfaction, and customer loyalty.

**WHO SHOULD ATTEND?**

This program is designed for bank managers who are responsible for making virtual and in-person outside calls to grow the bank. This includes bankers in retail in the branches, commercial lenders, small business lenders, mortgage originators, and wealth managers.

**Growing the Bank During a Pandemic**

**OBJECTIVE**

This session focuses on “Growing the Bank During a Pandemic.” Managers will learn to plan and direct the team toward an effective business development effort during this health crisis.

***Participant Key Skill Transfers to Take Away:***

1. Virtual and In-Person Business Development
2. Building Relationships with Bankers (Referral Sources) in Other Lines of Business
3. Sales Process in My Department to Keep the Culture Continuously Focused on Business Development Activities

**PROGRAM AGENDA**

* Key Issues on Growing the Bank During and After a Pandemic
* Value Proposition Review –Celebrate Our Individual and Team Successes
* Staying in Touch with Clients Electronically
* Selling Skills Using Email and Phone Calls
* New Ideas on How to Reach Customers
* Coaching the Staff Remotely to Gain Referrals
* Referring to Bankers in Other Lines of Business
* Helping the Customer by Asking About Their Dreams, Not Just Taking Orders
* Deposit Growth Strategies in a Bare Minimum Interest Rate Environment
* Connecting with Prospects in the New Economy
* Rhythms & Routines during the Workday
* Facilitator Sales Meeting Worksheet
* Participant Sales Meeting Worksheet
* AM & PM Huddles
* Mid-Week Clinics
* Call Planning for PPP Follow Up on Business Clients
* Call Plan Grid to Calendar Calls
* Challenges & Opportunities
* Action Plan

**Coaching for Optimal Performance**

**OBJECTIVE**

This session focuses on “Coaching for Optimal Performance.” Managers will explore how to keep a team motivated and focused on achieving organizational goals.

***Participant Key Skill Transfers to Take Away:***

1. Developing leadership skills to grow the branch.
2. Mastering an understanding of a leading a vibrant service and sales process in a branch environment.
3. Learning to train the branch team in key listening, referring, and selling skills to improve growth.

**PROGRAM AGENDA**

* Key Issues in Coaching for Optimal Performance to Promote Growth
* Recognition & Reward – Non-Monetary and Monetary
* Time Management for Coaching
* Coaching and Motivating Staff Remotely
* How to Hold a Productive Employee Video Call
* Giving Individual Attention to Each Employee Remotely
* Team Accountability with the Manager Away
* Managing Pandemic Anxiety and Stress
* Empowering the Team to Make Decisions
* Keeping Your Team Moving Forward
* Setting Expectations
* Maintaining Team Morale
* Getting Employees to Listen for Sales Cues
* Tying It All Together
* Action Plan
* Toolkit: Listening for Opportunities (lesson included)