



Frontline Branch Fall Series

A Four-Part Virtual Training

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A virtual series for branch retail staff looking to become qualified to move laterally or forward in their organization.

This series is a four-part, comprehensive training for new frontline banking professionals that focuses on creating a client friendly environment on a budget.

The instructor-led virtual series provides group discussions and case-studies and covers one topic of focus each month, September through December, from 9:00 am to 12:00 pm PT.

Series participants will:

- Gain a deeper understanding of challenges within the banking industry.
- Receive guidance on user experience and client experience best practices.
- Learn to plan for the impact of technology, artificial intelligence, and self-service on their financial institution and its employees.
- Develop the skills to be an ambassador for their financial institution and grow a personal network.

Series Details At-A-Glance

Participate in the full four-part series for **\$800** or attend an individual session for **\$250**. All sessions are three hours and run from **9:00 am to 12:00 pm pacific time**. Session topics include:

- **September:** Culture Shifting in Financial Institutions
- **October:** Wowing The Client
- **November:** Your Advisory Role
- **December:** Ambassadorship & Growth

Register Online Today

You are invited to sign up for our Fall Series virtual bootcamp sessions on our website. Please visit:

- [Calbankers.com/frontline-branch-series](https://calbankers.com/frontline-branch-series)

Meet The Presenter

Jennie Sobecki is the owner and CEO of Focused Results, a sales and marketing strategy, consulting, and training firm concentrating on purposeful process consulting and training experience in community banks and other financial institutions.



Jennie is a graduate of Indiana University and has a certificate in consulting services from Ball State University. Prior to joining Focused Results, Jennie 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



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Culture Shifting in Financial Institutions

September 26 \ 9:00 am - 12:00 pm Pacific time

- Focuses on the shift from order-taking to an engaged, advisory culture and the team issues faced when changing cultures.

Wowing The Client

October 31 \ 9:00 am - 12:00 pm Pacific time

- Addresses the needs, wants, and expectations of the new, digital, and younger banking clients and branch employees.

Your Advisory Role

November 28 \ 9:00 am - 12:00 pm Pacific time

- Presents opportunities for the business and employee to engage in activities and skills to drive results across the business for the near future.

Ambassadorship & Growth

December 19 \ 9:00 am - 12:00 pm Pacific time

- Addresses critical skills necessary to make the employee more valuable in the company, and in the community at large.

Training Partner

Focused Results

California Bankers Association is partnering with Focused Results to bring you this training opportunity. Focused Results, a sales and service training company for banks, credit unions, and state associations, delivers its educational programs virtually in 22 states across the US.

About The Online Virtual Training Experience

Sessions are held via private, invitation-only, password-protected Zoom meetings.

Each series participant will receive a login to register and participate in the private training sessions, and will need a computer, to participate individually, in group discussions, and in small group breakouts.

For more information, contact Rosemary Storm at rstorm@calbankers.com or 916.438.4401 or visit [Calbankers.com/frontline-branch-series](https://calbankers.com/frontline-branch-series)

