



# Branch Manager BOOTCAMP

*Virtual Webinar Series*

## Four-Part Next Generation Branch Manager Training

Virtual bootcamp sessions happen once per month from January through April.

What does your branch have that alternative branch channels such as mobile banking don't? People to readily serve its customers!

As the number of branch transactions continues to fall, community financial institutions must reassess the branch manager role. They must invest in providing managers the right people, tools, client goals, and sales goals, then step back and watch the results become a dynamic source of profitability.

This exciting, four-part program series focuses on the next generation bank manager who will lead vital bank transformation, transitioning to client relationship management and creating an active advisory environment for the client to achieve financial goals.

The program centers around the critical skills and expectations that need to be developed to ensure next generation branch managers will exceed expectations and goals.

Participants will engage in discussions and small group activities to ensure that ideas are shared and learning is entertaining and adopted.

### Bootcamp Details At-A-Glance

Participate in the full Bootcamp for **\$800** or attend an individual session for **\$250**. All sessions are three hours: **9:00 am to 12:00 pm Pacific Time**. Session topics include:

- Managing a Successful Branch
- Leading Service Excellence
- Enhancing Business Development
- Maintaining Superior Team Performance

### Meet The Presenter

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

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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## About The Online Virtual Bootcamp Experience

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

This four-session program is designed for new and experienced Branch Managers, Assistant Branch Managers, Teller Supervisors, Lead Frontline Professionals, and any professional aspiring to lead the team in a retail branch.

Each attendee will receive a login to register and participate in the training sessions.

Each attendee will also need a computer, to participate individually, in group discussions, and in small group breakouts.

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## Training Partner

### **Focused Results**

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

### Managing a Successful Branch

January 24 \ 9:00 am - 12:00 pm Pacific time

- Learn to create an energetic and productive workplace environment.
- Learn to manage the branch team and integrate technology to drive additional business.
- Drive business development even when the branch traffic is slow

### Leading Service Excellence

February 14 \ 9:00 am - 12:00 pm Pacific time

- Develop leadership skills to grow the branch.
- Master an understanding of leading a vibrant service and sales process in a branch environment.
- Learn to train the branch team in key listening, referring and selling skills to improve growth.

### Enhancing Business Development

March 14 \ 9:00 am - 12:00 pm Pacific time

- Master pre-call planning.
- Learn to call virtually or in-person on the right (most profitable) clients and prospects.
- Build relationships with productive referral sources.

### Maintaining Superior Team Performance

April 18 \ 9:00 am - 12:00 pm Pacific time

- Winning motivational strategies
- Learn best practices in employee development, performance improvement, and employee recognition.

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## Bank Registration Form

Bank Name

Phone

Complete Address

### Attendee 1 Details

Name

Title

Email

#### Branch Manager Bootcamp: \$800

Yes! I Want To Attend All Four Sessions

#### Individual Sessions: \$250 Each

Managing a Successful Branch

Leading Service Excellence

Enhancing Business Development

Maintaining Superior Team Performance

### Attendee 2 Details

Name

Title

Email

#### Branch Manager Bootcamp: \$800

Yes! I Want To Attend All Four Sessions

#### Individual Sessions: \$250 Each

Managing a Successful Branch

Leading Service Excellence

Enhancing Business Development

Maintaining Superior Team Performance

### Payment Details

Check enclosed for the amount of \$ \_\_\_\_\_ payable to California Bankers Association.

I hereby authorize CBA to charge my credit card for the total amount of \$ \_\_\_\_\_.

Visa     Mastercard     American Express

Card Number

CWV

Exp Date

Cardholder Name

Zip Code

Signature

#### Please Return To:

California Bankers  
Association  
Attn: Accounting Dept. — A/R  
1303 J Street, Suite 600  
Sacramento, CA 95814

#### Cancellations/Refunds:

Refunds will be granted only  
for cancellations received at  
least 10 days in advance.  
Attendee substitutions are  
always permitted.

For more information, contact Rosemary Storm at 916.438.4401 or  
rstorm@calbankers.com or visit [calbankers.com/bootcamp](https://calbankers.com/bootcamp)