

**NEW for 2022!**

# Branch Leadership Series

*The Tool Kit for Today's  
Branch Managers & Supervisors*

**The program will be held *virtual* & *in-person* at:**

**The Satterfield Center for  
Community Banking in Virginia**

**VACB ♦ 7204 Glen Forest Drive ♦ #101  
Richmond ♦ VA 23226**

*Presented in person, in four sessions*

**May 4 & 5, 2022**

**June 8 & 9, 2022**



## About our Branch Leadership Series:

More than ever before, today's retail banking leadership team is faced with a multitude of challenges and opportunities. Successful banks have branch leadership who are focused on motivating and engaging the team, building and increasing loyal customer relationships, mitigating risks through compliance and regulatory adherence, and accomplishing retail banking goals. In essence, the Branch Manager is the business manager. On-going education, training, and networking are essential in developing successful retail banking leadership in today's ever-changing environment.

### The benefits of this series include:

- An investment in developing "best practices" for your bank's branch network.
- An educational resource for training and career development.
- Recognition and opportunities for 2022 leadership.
- A foundation builder for banking schools.
- A commitment to successful, profitable, efficient and effective branches.

### Key Elements of this Series:

- *Develop and Implement Retail Banking Business Plan*
- *Discover Individual Leadership and Leadership Styles*
- *Ensure Regulatory, Compliance, Operational Efficiencies*
- *Mitigate Risks*
- *Grow the Retail Bank in 2022*
- *Explore Proven Sales, Service, and Relationship Building Skills and Tools*
- *Motivate and Boost Employee and Team Success*
- *Manage Challenging Situations with Team Members and Customers*
- *Strengthen Communication and Day-to-Day Effectiveness*
- *Increase "Bench Strength" in the retail banking offices*
- *Determine Critical Branch "Best Practices"*

**Note:** While it is **recommended** that participants attend all four sessions of the series to receive an entire overview the series, each session's materials stand alone; one session is not a prerequisite for the others. If you want your team members to learn about the curriculum presented in a particular session, the program provides a thorough education and may be attended as a stand-alone class.

### Meet Your Presenter Christie Drexler, Performance Solutions, Inc:



Christie has over 26 years of experience in the financial industry for community, regional and national banks. Her experience has been expansive to include successfully navigating retail, operations, treasury services, and commercial banking careers. She has served as a Regional Sales Manager, Chief Credit Officer, Chief Retail Officer, and Market/Division President. Christie is a passionate facilitator and coach with a focus on developing leaders.

### About Performance Solutions, Inc:

Performance Solutions, Inc. (PSI), is a training and consulting company that has been a part of the banking community for over 35 years. PSI specializes in providing solutions to the key challenges facing banks today in attracting and building relationships with their customers.

## Session I - May 4, 2022

### **New Year - New Start: Key Components for a Successful Year**

*Series I focuses on exploring the key components of a successful retail bank branch. Participants will leave with valuable tools and a "game plan" for 2022.*

#### **The agenda includes:**

- ◆ **Pre-Assignment:** Where Am I Today? Self-Assessment of Current Skills and Talents
- ◆ The Leadership Challenge for Today's Branch Leadership Team
- ◆ Communication Tools for Today's Branch Leadership Team
- ◆ Understanding and Leading Today's Team of Different Generations
- ◆ Implementing the 3 C's to Excellence – *plus one more*
- ◆ Defining the Performance Management Process for 2022
- ◆ Building the Branch Business Plan - Overview
- ◆ Retail Banking "Best Practices" and Action Planning

## Session II - May 5, 2022

### **Leading, Developing, and Engaging the Team**

*Series II focuses on building the branch team. Managers learn proven ways to get team members engaged and challenged to exceptional performance. An "engaged employee" is one who is fully involved in, and enthusiastic about, their work, and therefore will act in a way that furthers the bank's interests.*

#### **The agenda includes:**

- ◆ Building the Branch Business Plan
- ◆ Creating Employee Engagement
- ◆ Getting the Right Person in the Right Seat - Recruiting a Winning Team
- ◆ Celebrating Performance: Reward & Recognition
- ◆ Meetings – New Alternatives to Meetings
- ◆ Finding more Time – Time Leadership Skills
- ◆ Key Needs and Motivation of Today's Workforce
- ◆ Best Practices and Action Planning

## Session III - June 8, 2022

### **Growing the Retail Branch**

*Series III focuses on the Branch Manager's Role as Sales and Service Leader. Managers learn to plan, motivate, and challenge the team to consistently provide exceptional service and meet the Branch's goals.*

#### **The agenda includes:**

- ◆ The Retail Branch Performance Chart
- ◆ Finding How Today's Customer Experience is Changing
- ◆ Maximizing Your Bank's Competitive Edge
- ◆ Growing the Retail Branch from Within
- ◆ Security and Safety in Retail Banking
- ◆ Making Referral Recommendations
- ◆ Networking Do's and Don'ts
- ◆ Retail Banking "Best Practices" and Action Planning

## Session IV - June 9, 2022

### **Raising the Bar for Sustainable Growth**

*Series IV focuses on maintaining superior performance. Managers learn new methods for communicating and raising the bar through the performance leadership process, team building, and leadership abilities. We explore how to keep a team motivated and focused on achieving organizational goals.*

#### **The agenda includes:**

- ◆ **Pre-Assignment:** Review of the Self-Assessment
- ◆ Creating a Pathway for Sustainable Growth
- ◆ Conducting Performance Reviews - The Good, the Bad, and the Ugly
- ◆ Communicating Upwards
- ◆ Problem Solving and Change Leadership
- ◆ Dealing with Personalities, Conflicts, and Challenges
- ◆ Getting the Best from Team - Accountability Skills
- ◆ Expanding the Leadership Challenge
- ◆ Retail Banking "Best Practices"

## Program Fees & Details:

### Hotel Information

VACB does NOT have a block of rooms for this program. We do, however, have a negotiated rate of \$114 at the Hampton Inn, Glenside, single or double occupancy. To make a reservation, call the hotel DIRECTLY at 804-756-1777 and mention the Virginia Association of Community Banks | VACB to get our special rate. The hotel is located at:

**Hampton Inn Glenside ♦ 5406 Glenside Drive ♦ Richmond, VA 23228**

### CBWV Program Fees

The "Branch Leadership" Series is priced for maximum flexibility. The bank receives a significant discount by registering for the entire series. The bank may send the same person or a different individual for each session. Furthermore, the bank's registrant may attend any of these sessions as a single seminar.

#### Branch Leadership Series

**CBWV Member     \$850.00**  
**NonMember       \$1,700**

#### Individual Sessions

**CBWV Member     \$250.00**  
**NonMember       \$500.00**

### CBWV Cancellation Policy

Written or faxed program cancellations received seven (7) days prior to the program will receive a full refund. Cancellations received six (6) days or less prior to the program are subject to a \$75 cancellation fee. Cancellations received the day of a program will forfeit registration fees entirely. Substitutions are welcomed and encouraged up to and including the day of the program.

**Seminar Dates   May 4, May 5, June 8 , June 9**

**Cancel By:       April 25, April 26, June 1, Jun 2**

### Agenda for All Four Sessions

8:30 am    Registration & Continental  
                 Breakfast  
9:00 am    Program  
NOON       Lunch Break  
1:00 pm    Program  
4:00 pm    Adjourn

### ADA Requirements:

In order to accommodate a registrant with special needs, VACB needs to be notified of an attendee with any visual, hearing, or other impairment. Please complete the appropriate section provided on the Registration Form and be sure to include any FOOD allergies as well.

# Registration Form - Branch Leadership Series

Please check the dates of the sessions you plan to attend:

- I will attend the entire four-part series
- May 4, 2022 - New Year - New Start: Key Components for a Successful year
- May 5, 2022 - Leading, Developing, and Engaging the Team
- June 8, 2022 - Growing the Retail Branch
- June 9, 2022 - Raising the Bar for Sustainable Growth

Bank \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Cell Phone (for emergency) \_\_\_\_\_

Attendee Name \_\_\_\_\_ Email \_\_\_\_\_

Attendee Name \_\_\_\_\_ Email \_\_\_\_\_

Attendee Name \_\_\_\_\_ Email \_\_\_\_\_

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**Credit Card Information**     MasterCard     Visa     AMEX

Card Holder Name \_\_\_\_\_ Email Address \_\_\_\_\_

Credit Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Address where credit card bill is mailed \_\_\_\_\_

Please Bill Me    Total Amount Enclosed: \$ \_\_\_\_\_

**Return to CBWV by April 25, 2022**

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