

**Speaker:** Jennie Sobecki



Co-owner of Focused Results, a company concentrating in results-driven process consulting and training experience in credit unions and FI's. An expert in designing and implementing sales efforts and processes, Ms. Sobecki designs solutions to drive top line growth through better utilization and training of existing sales forces, including sales management. Ms. Sobecki is a graduate of Indiana University and has a certificate in consulting services from Ball State University. Prior to joining Focused Results, Ms. Sobecki was Director of Sales and Marketing for a \$3 billion bank holding company, Sales Manager for a high performing mid-level bank, and Director of Corporate Training for a large Midwest insurance company. A charismatic speaker and consultant, Ms. Sobecki consults with numerous financial service organizations on revenue, sales, sales leadership, and organizational performance.

**Program Overview:** What does your branch have that alternate branch channels like mobile banking don't? The branch has you and your people. As the number of branch transactions continues to fall, credit unions must reassess the role of the branch manager. Credit unions must invest in the manager, giving him or her the right people, tools, member goals, and service and sales goals, and step back and watch the results change into a dynamic source of profitability.

This exciting, two-lesson series will focus on the next generation manager who will be leading the transition to member relationship management, and to managing an active advisory environment for the member to achieve financial goals. The next gen manager will be leading this vital transformation.

The program will focus on the critical skills and expectations that need to be developed to ensure that the next generation branch manager will exceed expectations and goals set for him or her. Participants will engage in discussions, small group activities, and skills practices to ensure that ideas are shared and learning is entertaining and adopted.

**Day One:** Day 1 focuses on the Foundation Skills of a Branch Manager. Managers learn the key elements of managing a successful branch – selecting the team, staffing and scheduling, procedures, and building the team.

- The Winning Branch Manager
- Defining the Performance Management Process
- Understanding Your Management and Leadership Style
- Coaching, Counseling, and Disciplining
- Orientation — The First 90 Days
- Creating a Fun Work Atmosphere
- Challenges We Face With Younger Employees
- Generational Approach to Motivation and Managing
- Scheduling and Staffing Today's Work Environment
- Key Positions, Key Procedures
- Top Five List



# BRANCH MANAGER WORKSHOP

PART ONE



- Complete an Action Plan

**Day Two:** Day 2 focuses on “The Manager’s Role in Building and Leading an Effective Service and Sales Organization.” Managers will learn to plan and direct the team toward an effective business development effort. The participants will learn about:

### AGENDA

- Vision Review
- Red Carpet Exercise
- Rhythms & Routines at the Branch
  - Introduction to Service
  - Weekly Service Meetings
  - Huddles
  - Mid-Week Clinics
- Mini Lesson: Listening for Opportunities
- Service Leadership
- Discuss Challenges & Opportunities
- Complete an Action Plan

**Who Should Attend:** Senior Executives, VP’s of Marketing, Directors of Marketing, Senior Branch Management, Branch Managers, cash managers, and other credit union managers and leaders that must improve deposit sales performance in a credit union.

**Dates & Locations:** PART ONE - May 9 & 10

Time: 9:00 am – 4:00 pm  
Lunch Provided

Naperville, IL

*Illinois Credit Union League  
1807 West Diehl Road  
Naperville, IL*

| <b>Registration Fees:</b> | <b>Price</b> | <b>Type – ONE DAY</b>          | <b>Price</b> | <b>Type – TWO DAY</b>          |
|---------------------------|--------------|--------------------------------|--------------|--------------------------------|
|                           | \$235        | Affiliated                     | \$420        | Affiliated                     |
|                           | \$470        | Non-Affiliated                 | \$840        | Non-Affiliated                 |
|                           | \$188        | Affiliated- Small CU (>\$50 M) | \$336        | Affiliated- Small CU (>\$50 M) |

## SAVE THE DATE FOR PART TWO!

More details to come!

**October 9 & 10**  
Naperville, IL

**October 23 & 24**  
Springfield, IL

**NOTE-** Part One of this workshop series is a repeat of the program presented in 2017. Part Two of this workshop (scheduled for fall of 2018) is new material that builds on Part One.  
*It is recommended that participants attend Part One before Part Two.*



# BRANCH MANAGER WORKSHOP PART ONE



## REGISTRATION DEADLINE FOR WORKSHOPS: May 4, 2018

[CLICK HERE TO REGISTER](#)

Or complete the bottom portion and return via fax- 630-983-3212 or email- drew.kayvani@icul.com

Credit Union: \_\_\_\_\_

| Participant | Email |
|-------------|-------|
|             |       |
|             |       |
|             |       |
|             |       |

**Select Your Date:**  
Time: 9:00 am – 4:00 pm  
Lunch Provided

**May 9 & 10** (Two Day)  
Naperville, IL  
*Illinois Credit Union League  
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**May 9** (One Day)  
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**May 10** (One Day)  
Naperville, IL  
*Illinois Credit Union League  
1807 West Diehl Road  
Naperville, IL*

### PAYMENT *Select One*

\_\_\_\_\_ ACH Using Corporate Account  
Routing- \_\_\_\_\_ Account- \_\_\_\_\_

\_\_\_\_\_ Enclosed is share draft payable to Illinois Credit Union League (ICUL)  
Mail to ICUL, Attn: Education Dept., PO Box 3107, Naperville, IL 60566-7107

### SPECIAL REQUIREMENTS

Please advise if you have a physical, medical or dietary condition requiring special attention:

**CANCELLATION POLICY** View cancellation policy by [Clicking Here](#)

**Questions?** Contact Drew Kayvani at 630-983-3418 or [drew.kayvani@icul.com](mailto:drew.kayvani@icul.com)

### NEARBY HOTEL

Naperville Option- Hyatt Place  
27554 Maecliff Drive  
Warrenville, IL 60555  
630-836-9800



Illinois Credit Union League is Sponsoring this workshop