



UNIVERSAL BANKER CERTIFICATION SERIES

May 21 – 22, 2019 • North Carolina Bankers Association • Raleigh, NC

Speaker: **Jennie Sobecki – Owner & CEO, Focused Results**

Tuesday, May 21st

8:30 – 9 am	Registration / Continental Breakfast
9 – 10:30 am	In Session
10:30 – 10:40 am	Break
10:40 am – 12pm	In Session
12 – 1 pm	Lunch
1 – 2:30 pm	In Session
2:30 – 2:45 pm	Break
2:45 – 4:45 pm	In Session
4:45 pm	Adjourn

Day 1 – Culture Shifting in Community Banks

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

- Why community banks fail to compete
- Creating the advisory environment across the bank
- Growing the community bank appropriately
- Challenges in changing culture
- Analyzing staff performance across the bank
- Critical thinking – see the big picture
- The why's – learn the why I am doing something and the interworking of the job
- Assignment to be completed by Day 2

Wednesday, May 22nd

8:30 – 9 am	Continental Breakfast
9 – 10:30 am	In Session
10:30 – 10:40 am	Break
10:40 am – 12pm	In Session
12 – 1 pm	Lunch
1 – 2:30 pm	In Session
2:30 – 2:45 pm	Break
2:45 – 4:45 pm	In Session
4:45 pm	Adjourn

Day 2 – Wowing the Customer

Addresses the needs, wants, and expectations of the new, digital, and younger customers and employees.

- Present each team's Day 1 assignment findings to the class
- Customer expectations from smart customers



- Creating the ultimate UX (user/customer experience)
- Data vs. data driven decision-making
- Streamlining your work processes
- iGen and millennial customers – trouble and opportunity ahead, must be able to manage relationships up and down with co-workers, and with customer relationships
- Develop leadership skills and wow your employer – they will take notice
- Team work and flexibility go both ways – employee and employer – there is no departmental – only one employer
- Assignment to be completed before Day 3 (for full series attendees only)