



UNIVERSAL BANKER CERTIFICATION SERIES

September 30 – October 3, 2019 • NC Bankers Association • Raleigh, NC

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

Monday, September 30

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

Tuesday, October 1

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)

Wednesday, October 2

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 3 – Your Advisory Role

Presents opportunities for the bank and banker to engage in activities and skills to drive results across the bank for the foreseeable future.

- Present each team’s Day 2 assignment findings to the class
- Bank products – WIIFM (what’s in it for me?)
- The bank of the future – technology, artificial intelligence, and self service
- Transitioning your bank for the future
- Team selection and team rewards
- Social skills at events and during work time (i.e. lobby communication with customers)
- Social and business communication/etiquette
- Social media – what to share on Facebook, Twitter, etc.
- Assignment to be completed before Day 4

Thursday, October 3

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 4 – An Ambassadorship & Growth

Addresses critical skills necessary to make the banker more valuable in the bank, and in the community at large.

- Present each team's Day 3 assignment findings to the class
- Being an ambassador for your bank
- Dress in public: better to overdress than under dress
- Doing it right the first time – proof reading for accuracy
- Building your network
- Assessing strengths and weaknesses – yours and the bank's
- Community bank case study