



MISSOURI
INDEPENDENT
BANKERS
ASSOCIATION

UNIVERSAL BANKER:
GROWING THE BUSINESS FROM
MILLENNIALS TO BABY BOOMERS

MARCH 5-6, 2019



NOW A TWO DAY PROGRAM WITH CERTIFICATION!

MIBA HEADQUARTERS
108 E. HIGH ST, SUITE B
JEFFERSON CITY, MO 65101

COURSE INTRODUCTION

With reduced in-branch transactions and customer visits and increases in technology, less traditional teller functions are needed. No longer can a frontline team member say, "It's not my job!" Today's frontline team is shifting from traditional positions (tellers, new account representatives, financial service representatives, etc.) to a multi-tasking, "universal "banker. Likewise, customer base is shifting from the traditional "visit the bank twice a week", to quick response, electronic banking relationships with the bank.

This two-day certification program focuses on the essentials for today's universal banker in providing exceptional service, making referrals, and building profitable relationships from millennials to baby boomers. The Certification Program is packaged full of checklists, job aids, case studies, examples and "real world" situations. Attendees will also receive a Certification of Completion.

KEY OBJECTIVES

- Understanding the Changing Role of Retail Banking
- Defining and Developing the Universal Banker
 - Core Competencies for the Universal Banker
 - Defining Professionalism for Today's Bankers
 - Etiquette and Netiquette Tips and Tools
 - Representing the Bank and Networking
- Becoming the One Source for the Exceptional Customer Experience
- Moving from Order Taker to Relationship Builder
- Maximizing the Customer On-Boarding Process
- Making Referrals as Simple as A-B-C
- Meeting the Needs of Today's Customers
 - Focus On Baby Boomers
 - Focus on Generation X
 - Focus on Generation Y (Millennials)
 - Focus on Generation Z
- And much more...

BENEFITS AND PROCESS FOR CERTIFICATION

Benefits:

- An investment in developing “best practices” for bank’s retail network.
- An educational resource for training and career development and retention.
- Recognition and opportunities for frontline team members
- A Foundation builder for banking schools.
- A commitment for successful, profitable, efficient and effective retail banking network..

Process:

This is a comprehensive certification program that focuses on three key components:

- Completion of the Universal Banker Certification Program.
- Completion of assessment before and after attending the Certification Program.
- Annually attending one workshop to re-certify each year.

ABOUT THE PRESENTER: DIANNE BARTON

Dianne Barton is the founder and president of Performance Solutions, Inc., a training and consulting company that specializes in providing solutions to the key challenges facing banks today in attracting and building relationships with their customers. Dianne’s expertise in customer service, leadership, performance cultures, retail regulatory and compliance is recognized as leading edge by many banks. Her programs are designed to “close the gap” between the bank’s needs and employees’ skills. Her philosophy of experiential learning and participant involvement in training led to the development of her energized, interactive training method that is skill based rather than theory based. Prior to founding Performance Solutions, Inc., Dianne held senior positions with Bank South Corporation, the IRS and John H. Heartland Company, where she introduced the highly acclaimed Officer Call Program.

REGISTRATION FORM

Name of Bank: _____

Address: _____

City, State, Zip _____

Phone #: _____

Attendee/Title: _____

E-Mail: _____

Attendee/Title: _____

E-Mail: _____

Payment Method:

Check Enclosed

Invoice Me

Credit Card*

*If you are paying by credit card, please fill out the following information

Name on Card: _____

Billing Address: _____

Card Number: _____

Exp Date: _____ Security Code: _____

There will be a 3% Convenience Fee for credit card payments



Please Remit form & payment information to:

Missouri Independent Bankers Association
PO Box 1765
Jefferson City, MO 65102

Fax: (573) 636-2753

E-mail: sluetkemeyer@miba.net

PRICING:

MEMBER: \$395

NONMEMBER: \$790

FEES INCLUDE: COURSE
MATERIALS, LIGHT
BREAKFAST, REFRESHMENT
BREAK AND LUNCH

WHO SHOULD ATTEND?

- ◆ ALL BANK EMPLOYEES IN
CUSTOMER CONTACT
POSITIONS

HOTEL RESERVATIONS CAN BE MADE AT:

- DOUBLETREE BY HILTON HOTEL
573.636.5101

OR

- CAPITOL PLAZA HOTEL
573.635.1234

PLEASE REFERENCE GROUP NAME:
MISSOURI INDEPENDENT
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