



VIRTUAL RETAIL BRANCH MANAGER DEVELOPMENT PROGRAM

Providing a Strong Foundation
for the Next Generation
of Northwest Bankers

October 2023 – March 2024

WBA Members*: \$2,750 early bird; \$3,250 after Sept. 17

Non-Members: \$3,250 early bird; \$3,750 after Sept. 17



Register Here:

www.bankerscontent.com/23rbmdpreg

WHO SHOULD ATTEND?

The Retail Branch Manager Development Program focuses on providing bankers a strong foundation in the dynamic and demanding retail banking sector. The program is specifically tailored for current retail bank managers and bankers seeking a retail management position. Participating bankers will commit to a session per month and can expect up to six hours of homework. Students are paired with a self-selected mentor from their institution for class support and to facilitate engagement with key leaders.

EXPLORING OPPORTUNITIES IN BANKING

October 12, 2023 • 8:30 - 10:30 a.m.; 1:00 - 3:00 p.m.
October 13, 2023 • 8:30 - 11:30 a.m.

Discover the vast potential of the banking industry in our first session. Led by industry expert Drew Wilkens, this program will introduce you to a panel of experienced retail bankers who will engage in a thought-provoking discussion on current and future opportunities, effective change management strategies, and personal development.

During this session, we'll explore how crises have shaped community banking, analyzing past, present, and future prospects. We'll emphasize the significance of retail banking, highlighting its purpose while focusing on personal growth and the pivotal role of branch managers as ultimate stakeholder managers. This discussion will lay the groundwork for your team's Course Engagement Project, offering insights into industry responses to crises and resulting changes.

Students will:

- Examine past, current, and future opportunities in retail banking.
- Connect organizational purpose with personal purpose.
- Explore post-COVID leadership styles that focus on team-member growth and development.
- Understand why branch managers are crucial for all stakeholders.

Instructor: Drew Wilkens, SVP/Strategic Projects, SaviBank



BANK LENDING ESSENTIALS: THRIVING IN AN EVOLVING MARKET

November 1, 2022 • 8:30 - 3:30 pm

This session empowers branch managers with the knowledge and skills to understand lending issues facing the bank and borrowers. By exploring the fundamentals of consumer, mortgage (including HELOCs), and commercial lending, students gain a strong foundation in key lending principles.

A particular focus is placed on the essential client and lender relationship, emphasizing its significance for retail bankers. Students will also understand the importance of cash management and treasury services to a bank and how they impact the institution's long- and short-term cash flow and liquidity. Through interactive discussions and real-life case studies, students apply their knowledge to maximize lending opportunities and adopt a proactive approach in the ever-evolving area of lending.

Students will:

- Explore issues impacting the bank's lending function.
- Gain an understanding of how banks make lending decisions.

VIRTUAL PROGRAM

This program will be held virtually and students will be provided information regarding the virtual platform upon registration. WBA's virtual program allows student to interact with each instructor, ask questions and learn from their fellow classmates.

- Understand the fundamentals of consumer, mortgage, and commercial lending.
- Apply concepts to real-life case studies.
- Cultivate effective client and lender relationships.
- Develop proactive strategies to thrive in the evolving landscape of bank lending.

Instructor: Richard Mayeda, FVP/Senior Credit Officer, First Financial Northwest Bank



LEAD INTENTIONALLY

November 29, 2023 • 8:30 - 10:30 am; 1:00 - 3:00 pm
November 30, 2023 • 8:30 - 11:30 am

How do you excel at leading while fulfilling your responsibility as a branch manager? It starts with the fundamentals of self-reflection in how we lead and manage. What about the employee experience? What three words would you use to describe the work culture at your branch? Does your staff feel included? Do they have clear expectations and the training, the tools, and the coaching to deliver the customer experience as expected? Come learn how to build a team that works together for the common good. Learn how to coach and motivate your team to be committed to branch success.

Students will:

- Key leadership qualities for success
- What does it mean to be exceptional?
- Identify and resolve branch pain points
- Your role as the reputation builder
- Benefits of engaged employees
- Setting behavior and performance expectations
- Coaching: What it is and what it isn't
- Best Practices of managing a branch

Instructor: Vicki Kraai, InterAction Training



UNLEASHING THE POWER OF A HIGH-PERFORMING TEAM: CONNECTING PURPOSE WITH RESULTS

January 11, 2024 • 8:30 - 10:30 a.m.; 1:00 - 3:00 p.m.
January 12, 2024 • 8:30 - 11:30 a.m.

This session focuses on harnessing the power of a high-performing team by aligning purpose with results. Participants will deepen their understanding of purpose-driven work through group discussions and purpose statement reviews. The session will cover critical topics such as purpose-driven recruiting, embracing individual strengths, continuous training, and building a knowledgeable team of trusted advisors. Participants will also explore revenue-focused strategies, effective delegation, and creating mechanisms for synergy.

HOMWORK AND MENTORS

Participants are required to complete up to six hours of homework a month. This prepares them to best understand the topics, challenges them to be proactive in their learning, and to seek out the advice of key individuals within their own institution when needed. After completing their individual assignments, the participants then discuss within their class to compare notes and learn how their peers approached the questions. Each student is also paired with an executive-level mentor from their bank, who works with them to reinforce the classroom learning experience. Mentors are a required part of the program, and act as a sounding board and to assist in understanding new concepts.

Students will:

- Understand the connection between purpose and results in team performance.
- Apply purpose-driven recruiting techniques and how to conduct behavioral interviews.
- Embrace individual strengths within the team and foster continuous development.
- Build a knowledgeable "brain trust" within their group.
- Identify untapped revenue opportunities for community banks.
- Differentiate between management and corporate reporting and leveraging market data for decision-making.
- Implement effective delegation and empowerment techniques for achieving results.
- Establish regular check-ins and create mechanisms for synergy within the team.

Instructor: Drew Wilkens, SVP/Strategic Projects, SaviBank



COMMUNICATE AND CONNECT WITH CONFIDENCE

February 14, 2024 • 8:30 - 10:30 am; 1:00 - 3:00 pm
February 15, 2024 • 8:30 - 11:30 a.m.

Communicating effectively is an art. Regardless of your position in the organization, elevating your communication skills will impact relationships with peers, customers, and the CEO. Participants will move beyond theory into practical ideas for communicating assertively, coaching and giving feedback, and much more. Karen Butcher brings an experiential presentation style to her workshops and has a gift for getting everyone involved. Get ready to dig deep.

Students will:

- Assess personal communication styles
- Recognize how ego gets in the way of effective communication
- Identify strengths and blind spots
- Eliminate workplace drama
- Clarify the difference between feedback and coaching
- Practice a variety of conversations
- Leave with a plan of action

Instructor: Karen Butcher, InterAction Training



CUSTOMER ENGAGEMENT EXCELLENCE: FROM AWARENESS TO ADVOCACY

March 7, 2024 • 8:30 - 10:30 a.m.; 1:00 - 3:00 p.m.
March 8, 2024 • 8:30 - 11:30 a.m.

Discover the power of customer engagement and its crucial role in driving business success. In this session, you will learn how to unlock the power of customer engagement from the initial awareness stage to transforming customers into passionate advocates for your institution. Discover innovative techniques and gain valuable insights to help your team master the art of customer engagement. Leverage data analytics to explore the customer journey and understand customer psychology. This session equips you with the skills to deliver exceptional experiences at every touchpoint transforming satisfied customers into brand ambassadors.

Student will:

- Explore changes in customer banking needs and habits.
- Develop strategies to adapt and align your services to meet evolving expectations.
- Understand the key drivers of customer service leadership.
- Build customer loyalty that transforms customers into brand advocates.
- Identify best practices in a solutions-driven culture.
- Deliver your team's Course Engagement Project presentation.

Instructor: Drew Wilkens, SVP/Strategic Projects, SaviBank



VIRTUAL NETWORKING

Networking is a key aspect to WBA's Development Programs, so to facilitate learning about your peers in a virtual world, we have designated the last hour of the second day of class each month to be dedicated to networking.

"THIS CLASS SURPASSED MY EXPECTATIONS! THE RELATABLE INFORMATION AND THE ENGAGEMENT FROM OTHER CLASSMATES WAS BENEFICIAL, AS WAS THE THOROUGH REVIEW OF THE MATERIAL."

Dulci Mustin, Sound Community Bank

"IT REALLY MADE ME THINK ABOUT SITUATIONS I CAN FIX AS A MANAGER, AND I FEEL BETTER ABOUT HOW THE APPROACH I AM GOING TO TAKE."

Gary Zambor, 1st Security Bank of Washington

COST FOR PROGRAM

- WBA Members*: \$2,750, \$3,250 after Sept. 17
- Non Members: \$3,250, \$3,750 after Sept. 17

SPEAKER PROFILES

Karen Butcher, is the head coach and pivotal people trainer at InterAction Training. Her work has included being a high school economics teacher, 4-H youth agent, Mary Kay sales director, and director of training at a community bank in Kentucky. She has seen the need for a new leadership philosophy to hold leaders and their teams accountable and let go of outdated practices.

Vicki Kraai, is the CEO of InterAction Training. Vicki's 25 plus years of community bank experience started at the family bank in rural Nebraska, serving as a bank teller and eventually becoming CEO. Vicki's many years of banking include credit card lending experience where she was a member of the management team that launched the Cabela's credit card program. She has a passion for developing people for success in their roles and careers. Clients and program attendees value Vicki's highly engaging "been there, done that" approach to all facets of her training and speaking engagements.

Richard Mayeda is the first vice president and senior credit officer at First Financial Northwest Bank. He has over 35 years of banking experience, almost all of it in commercial lending. He calls himself an all-around Pacific Northwest banker as he has worked for seven different institutions over the years, of all different sizes, in the states of Washington, Idaho and Oregon. He has experience first as a credit analyst, a small business lender, before moving to commercial banking and finally to credit administration. For the past five years, he has also served as a Research Report Advisor for Pacific Coast Banking School.

Drew Wilkens is currently the Senior Vice President of Strategic Projects for SaviBank. Prior to that, he was an executive vice president for a regional community bank, responsible for the mortgage, retail, and business banking sectors, where he worked for over 15 years. He received his Master of Business Administration (MBA) from Western Washington University and has remained on staff as an instructor, teaching an undergraduate management class that covers corporate governance, corporate social responsibility, ethical decision-making, and stakeholder management, along with diversity, equity, and inclusion, for the College of Business and Economics. He also earned a degree from the Graduate School of Banking at Colorado in 2011.

ATTENDANCE

Students can miss up to one class during this program. If more than one class is missed, the student will not receive their graduation certificate, but can earn it by attending missed classes the next year.

Register online at www.bankerscontent.com/23rbmdpreg

Mail: WBA, 601 Union Street, Suite 1720, Seattle WA 98101

Call: (206) 447-1700 Online: www.wabankers.com/rbmdp

Recommended Prerequisites

Before joining the WBA's RBMDP, we strongly recommend several courses to help you prepare and be successful. These courses are offered through the ABA and are available online at your convenience. Contact WBA for more information about registration.

Essential Selling Skills Bundle

Servicing & Growing Small Business Relationships

Management Essentials Suite

* Attendance at WBA programs is limited to employees, officers and directors of WBA members, non-members eligible for membership in the WBA and members of other state banking associations which grant reciprocal privileges to WBA members.

Cancellation Policy: For all cancellations that occur up to seven days prior to the start date, a \$50 cancellation fee will be charged. For cancellations with less than seven days notice, there will be no refunds. A substitute can attend at no fee. Cancellation Procedure: Cancellations must be sent in writing to the WBA office via email, fax, or mail. No refunds will be granted until a written cancellation request is received by WBA.

