



RETAIL BRANCH MANAGER DEVELOPMENT PROGRAM



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October 2026 – March 2027

State Banking Association Members: \$2,750

Providing a Strong Foundation for the Next Generation of Bankers



Register Online: www.bankerscontent.com/26rbmdp

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 each month. 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 7, 2026 • 9:00 a.m. – 1 p.m. PT

October 8, 2026 • 9:00 a.m. – 1 p.m. PT

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, President, Wilkens Consulting Group

BUSINESS DEVELOPMENT

November 12, 2026 • 9:00 a.m. – 1 p.m. PT

November 13, 2026 • 9:00 a.m. – 1 p.m. PT

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.

- 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: Drew Wilkens, President, Wilkens Consulting Group

LEAD INTENTIONALLY

December 10, 2026 • 9:00 a.m. – 1 p.m. PT

December 11, 2026 • 9:00 a.m. – 1 p.m. PT

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:

- Identify key leadership qualities for success.
- Understand what it means to be exceptional.
- Identify and resolve branch pain points.
- Examine the benefits of engaged employees
- Explore setting behavior and performance expectations.
- Understand coaching, including what it is and what it isn't.
- Identify best practices of managing a branch.

Instructor: Vicki Kraai, CEO, InterAction Training

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

January 7, 2027 • 9:00 a.m. – 1 p.m. PT

January 8, 2027 • 9:00 a.m. – 1 p.m. PT

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

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.

also explore revenue-focused strategies, effective delegation, and creating mechanisms for synergy.

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, Drew Wilkens, President, Wilkens Consulting Group

HIGH-IMPACT CONVERSATIONS

February 4, 2027 • 9:00 a.m. – 1 p.m. PT
February 5, 2027 • 9:00 a.m. – 1 p.m. PT

The quality of our conversations directly impacts the quality of our leadership. This session will introduce a simple and highly effective approach to any conversation with opportunities for practice in the areas of coaching, giving and receiving feedback, and delegation. You will learn techniques for overcoming defensiveness, asking powerful questions to discover underlying needs, and how to strengthen relationships, even during challenging conversations.

Students will:

- Learn a simple and powerful framework for any leadership conversation.
- Develop skills to strengthen your coaching approach.
- Explore barriers to difficult conversations and how to overcome them.
- Practice models for receiving and providing difficult feedback.

Instructor: Chris Wheatley, Wheatley Leadership Group

CUSTOMER ENGAGEMENT EXCELLENCE: FROM AWARENESS TO ADVOCACY

March 4, 2027 • 9:00 a.m. – 1 p.m. PT
March 5, 2027 • 9:00 a.m. – 1 p.m. PT

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, President, Wilkens Consulting Group

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

COST FOR PROGRAM

State Banking Association Members*: \$2,750

SPEAKER PROFILES

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.

Chris Wheatley owns Wheatley Leadership Group, and thanks to over 10 years of experience in management, leadership and training, helps develop individuals, teams and organizations into healthy and productive organizational environments. He spent over a decade at Gonzaga University in various leadership roles. He currently works with corporate and non-profit clients.

Drew Wilkens is president of Wilkens Consulting Group. He was previously 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 may miss one class during the program. However, missing more than one class will result in ineligibility for the graduation certificate. Students must inform the WBA course administrator of any planned absences to explore options for earning attendance credit for the missed class.

Register online at www.bankerscontent.com/26rbmdp

Learn more 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.

Essential Selling Skills Bundle
Servicing & Growing Small Business Relationships
Management Essentials Suite

We also strongly recommend attending our Understanding Bank Performance to help prepare. Students who register for both RBMDP and UBP will receive a \$500 discount on their UBP registration. Learn more about the program at www.wabankers.com/ubp.

* 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 are invited to participate as members.

Cancellation Policy: For all cancellations that occur up to seven days prior to the start date, a \$300 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.

