



Instructor: Jennie Sobecki

BRANCH MANAGER BOOTCAMP

Course #: C1017L

Pineland Conference Center, 16 Pineland Drive, New Gloucester, Maine

MAY 6 & 7, 2019 FROM 8:00 AM—5:00PM

What does your branch have that alternate branch channels don't? The branch has you and your people. As the number of branch transactions continues to fall, banks must reassess the role of the branch manager. Developing the right people, tools, client and sales goals will see results change into a dynamic source of profitability. This exciting, two-day series will focus on the next generation manager who will be leading the transition to client relationship management, and to managing an active advisory environment for the client to achieve financial goals. This next gen manager will be leading this vital transformation.

course description

Day One Morning: Focuses on the foundation skills of a Branch Manager. Managers learn key elements of managing a successful branch—selecting the team, staffing and scheduling, and building the team

Day One Afternoon: Focuses on “The Manager’s Role in Building and Leading an Effective Service and Sales Organization.” Managers will learn to plan and direct the team toward an effective business development effort.

Day Two: Business Development “Getting Out of the Office”, focuses on the relationship building process to identify how to gain the trust of your client, gain a larger share of wallet, and present solutions that solve your clients’ needs.

Looking for more details? [Visit our website](#) for a detailed course description.

how to enroll

Enroll online at our website, [CFTEA.org](#) under Business Skills.

how class works

Course sessions run two consecutive days. Completion of all requirements provide the Branch Manager Bootcamp Certificate.

tuition

\$699 per participant. Materials and Lunch included.

withdrawal policy

CFTEA withdrawal policy is outlined within our latest catalog and on our website. Before class begins the enrollment may be transferred to another student with the approval of the student’s employer and the CFTEA office.

**Would you like to see
this program in your area?**

**[Contact](#) the CFTEA office for pricing and
scheduling options at a location
near you.**

SPRING 2020 Registration and Offerings

Select courses to register

January 2020

- Residential Mortgage Lending Webcourse starts 1/4/2020
- Accounting (\$100 Off Sale) Webcourse starts 1/20/2020
- 40 Steps to Make Safe Deposit Boxes a Profit Center Webcourse 1/29/2020 (Special pricing discount)
- Commercial Lending Webcourse starts 1/30/2020

February 2020

- IRA Fundamentals—Machias, Maine 2/5/2020
- Medallion Signature Guarantee—Montpelier, Vermont 2/5/2020
- Notary Public Workshop—Montpelier, Vermont 2/5/2020
- Top 50 Important Safe Deposit Box Operating Procedures Webcourse –2/13/2020

March 2020

- Quality Service Webcourse starts 3/4/2020
- IRA Fundamentals—Montpelier, Vermont 3/10/2020
- IRA Advanced—Montpelier, Vermont 3/11/2020
- IRA Fundamentals—Augusta, Maine 3/11/2020
- IRA Fundamentals—Rutland, Vermont 3/11/2020
- HSA Fundamentals—Montpelier, Vermont 3/12/2020
- Top 25 Safe Deposit Compliance Issues Webcourse 3/17/2020
- Written Communication Webcourse starting 3/17/2020
- IRA Fundamentals—Rockport, Maine starting 3/18/2020
- Modern Supervisor—New Gloucester, Maine starting 3/24/2020
- IRA Fundamentals—New Gloucester, Maine 3/31/2020

April 2020

- Consumer Lending Webcourse starts 4/1/2020
- IRA Advanced—New Gloucester, Maine 4/1/2020

April 2020

- HSA Fundamentals—New Gloucester, Maine 4/2/2020
- Legal Foundations in Banking Webcourse starting 4/2/2020
- Modern Supervisor—Gilford, New Hampshire starts 4/9/2020
- Enhance Your Potential, Build Your Leadership Narrative Certificate—New Gloucester, Maine starts 4/16/2020
- 30 Steps to Audit a Safe Deposit Department Webcourse 4/22/2020
- Communicate with Confidence, Comfort and Conviction—New Gloucester, Maine 4/22/2020

May 2020

- Branch Manager Bootcamp—New Gloucester, Maine starts 5/6/2020
- Structuring Commercial Loan Packages—New Gloucester, Maine 5/20/2020

REGISTRATION - Scan to tammy@cftea.org

Name: _____

Organization: _____

Month of Birth: _____ Day of Birth: _____

Email: _____

Contact Phone: _____

Register for courses selected above or another course and code:

Approval Signature:
