

CFTEA



Center for Financial Training
& Education Alliance

Unlock your potential.



ABOUT US

We started in 1912, fueled by a passion for accessible education. Today, we're CFTEA, a non-profit where YOU are at the heart of everything we do.

Generations have discovered why CFTEA is unique:

- **Trusted:** We've been helping people reach their career goals for over a century.
- **Flexible:** Learn on your terms, at your pace, with programs designed for busy lives.
- **Passionate:** Our instructors and staff are experts who care about your success.
- **Innovative:** We're constantly pushing boundaries to bring the best learning experiences.

Ready to unlock your career potential? Visit www.cftea.org and see what CFTEA can do for you!

An Accessible Non-Profit Learning Community

2024 JANUARY

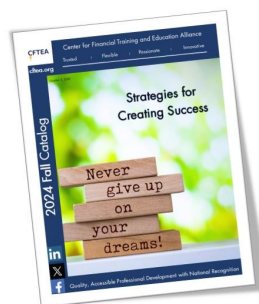
CFTEA INSIDER

WHAT'S INSIDE

- Changes to CFTEA Student Award Dinners
- 2024 Academic Year Reminder
- Unlock A Library Of Learning, Wherever You Roam
- 2024 Training Conference & Expo
- New and Updated Courses
- Virtual Classroom Schedule (January—March 2024)
- Branch Manager Bootcamp



EXPLORE OUR UNIQUE SOLUTIONS AND EMPOWERMENT NOW.



WHAT DO YOU WANT TO SEE IN THE FALL 2024 CATALOG?

How can CFTEA help you reach your development and retention goals?

Work is being done on the Fall 2024 offerings. What would you like to see? [Add your voice!](#)



2023-2024 CERTIFICATE AND DIPLOMA CATALOG

What requirements have changed with certificates and diplomas?

Looking for worksheets to track your progress? Download: [2023-2024 Worksheets for all awards!](#)

▶ www.cftea.org

▶ 888.366.3242

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2024 CHANGES TO STUDENT AWARD DINNERS

CFTEA Student Award Dinners have been a long-standing tradition. They have been an opportunity to publicly recognize the hard work devoted to continued education. Many of CEOs and senior managers set aside the time to support their employees at these events.

After the COVID-19 pandemic, live events have been more challenging though recognition is more important than ever.

Many organizations want to celebrate their own employees internally in their own ways. This could be at a company event or a special delivery at their location.

To support this change, CFTEA will be sending awards to the CFTEA representative at each financial institution after May 31 each year instead of award dinners. Included in the package are special bags for each award recipient as an additional congratulations to them.

If you are unsure of what employees are tentatively set to receive awards, please contact Tammy.

Recognition is a crucial element in employees feeling valued, increasing their engagement, and providing positive reinforcement. *Would you like a CFTEA representative in attendance to give out awards?* [Contact us.](#)

CFTEA is here to support you.



We appreciate your true commitment and dedicated hard work!
Celebrate your successes with pride in a job well done!



We would love to have photos to share.

Please send along pictures of you with your awards to info@cftea.org
Or tag us on your social media posts!



CFTEA.ORG



2024 CERTIFICATE & DIPLOMA RECOGNITION

Plan ahead. Courses are reviewed through the year to verify the completion of certificates, diplomas, and certifications.

Academic Year Ends: May 31, 2024

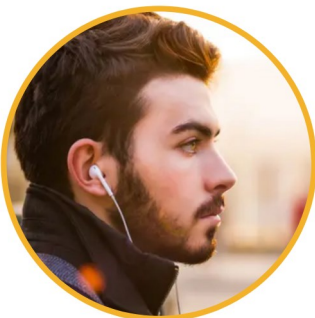
Do you believe you have completed or are close to completing an award before the May 31, 2024 deadline?

[Reach out to Tammy in the CFTEA office to check your progress.](#)

CFTEA looks forward to congratulating on your achievements.

UNLOCK A LIBRARY OF LEARNING, WHEREVER YOU ROAM

The CFTEA Global Workplace Skills Library is here!



For 2024, access learning content from your computer, tablet, or smartphone at an introductory price of \$99! This is not a subscription, but access for life. New content is added at no additional charge. Price will increase in 2025.

Topics include: Building Confidence and Assertiveness, Real Life Body Language, Improving Mindfulness,

Increasing Your Happiness, Transforming Key Areas of Your Life, along with exclusive discussions focused on insights and tips from people who understand the challenges we all face at work in Pain Points.



Find Out More!

CFTEA is unique in providing free content. In 2023-2024, the amount of free courses, workbooks, and exam retakes so far:

Courses:

145

Value Provided:

\$18,848

“

“The best investment you can make is in your people. The next best thing is to provide them with the tools and resources to succeed.”

”

UPCOMING: 2024 TRAINING CONFERENCE AND EXPO (ORLANDO, FL) FEBRUARY 26-28

Expand Your Options! Look to attend the premier learning development conference designed to connect, engage, and gain insights beyond a limited audience.

Content focuses on the challenges facing learning professionals and gives attendees the very best in skill-building content, train-the-trainer essentials, eLearning, behavioral analytics, emerging technologies, and more!

Use CFTEA promo cost for an additional member-only \$150 savings!



Find Out More!



CHANGE AHEAD: COURSE UPDATES

The following courses have been updated for awards!

[Automated Clearing House \(ACH\)](#)

[Calming Upset Customers \(and Co-Workers!\)](#)

[Cash Management Services](#)

[Fair Lending Overview](#)

[Flood Insurance Overview](#)

[Mortgage Fraud and Ethical Behavior](#)

[PCI Essentials to Support Cardholder Data Handlers](#)

The following courses are new or scheduled for updates for awards!

BSA for Operations

Fraud Detection Techniques, Reporting, and Prevention

Home Equity (Open End Credit)

Responding to an RFP (Request for Proposal)

Securing Customer Information

Securing Non-Public Areas

Understanding SBA Eligibility and Loans



VIRTUAL CLASSROOMS



January 2024

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager starts 1/23/2024](#)

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager starts 1/24/2024](#)

February 2024

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager starts 2/1/2024](#)

[Calming Upset Customers and Co-Workers 2/7/2024](#)

[Outside Calling School for Branch Managers, Lenders, and Business Development staff starts 2/7/2024](#)

[Outside Calling School for Branch Managers, Lenders, and Business Development staff starts 2/8/2024](#)

[47th Annual Training Conference & Expo 2024 – Orlando, FL 2/26-2/28/2024 \(Save an additional \\$150 with code CFTEA\)](#)

[Legal Foundations in Banking starts 2/27/2024](#)

[Legal Foundations in Banking Virtual Classroom starts 2/28/2024](#)

[Principles of Banking starts 2/29/2024](#)

March 2024

[Calming Upset Customers and Co-Workers 3/13/2024](#)

o [Minimizing Health Care Expenses in Retirement \(Free\) - 3/19/2024](#)



UNLOCK YOUR POTENTIAL



GET IN TOUCH

-  WWW.CFTEA.ORG
-  INFO@CFTEA.ORG
-  888.366.3242
-  FACEBOOK.COM/CFTEA.ORG
-  LINKEDIN.COM/SCHOOL/CFTEA

WE ARE HERE

We strive to empower students to achieve their goals, support organizations to realize success, and strengthen communities to create positive change by delivering specialized, relevant, and accessible educational programs.

BRANCH MANAGER BOOTCAMP - LIVE VIRTUAL CLASSROOM SERIES



Introduction

Want to grow your total assets in excess of 20% year-over-year? Wish to grow your deposit base by more than 20%? Then consider an investment in training your branch managers in our Branch Manager Bootcamp! What does your branch have that alternate branch channels and non bank competitors don't? The branch has you and your people. As the number of branch transactions continues to fall, community banks must reassess the role of the branch manager. Companies must invest in the manager, giving him or her the right people, tools, client goals and sales goals, and then step back and watch the results change into a dynamic source of profitability. This exciting four-part 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. The next gen manager will be leading this vital transformation.

The program will focus on the critical skills and expectations that need to be developed to ensure that the next generation branch manager will exceed expectations and goals set for him or her. Participants will engage in small group breakouts called PODs where they work with branch managers from across the country! They will learn national best practices and expand their network!

Topics

Managing a Successful Branch

January 24, Feb 1, May 22, 23, Sept 18, or 26

Leading Service Excellence

February 14, 29, June 19, 27, Oct 23, or 31

Business Development

March 13, 21, July 17, 25, Nov 13, or 21

Maintaining Superior Team Performance

April 17, 25, Aug 21, 29, Dec 11, or 19

* [See cftea.org](https://cftea.org) for afternoon sessions available

[Register at cftea.org](https://cftea.org) and view video overview.

Who Should Attend

New and experienced branch managers, assistant branch managers, teller supervisors, lead front-line professionals and any professional aspiring to lead the team in a retail branch.

Virtual Classroom Seminar Details

Seminars listed run from 9am—Noon EST. The instructor presents with a slideshow, as if training in front of a classroom. Cost is \$250 per seminar or \$800 for the series.

Meet Our Presenter



Jennie Sobecki is the owner and CEO of Focused Results, a sales and marketing strategy, consulting and training firm concentrating on results-driven process consulting and training experience in community banks and other financial institutions. An expert in designing and implementing sales efforts and processes, Jennie designs solutions to drive top line growth through better utilization and training of existing sales forces, including sales management.

Jennie is a graduate of Indiana University and has a certificate in consulting services from Ball State University. Before joining Focused Results, Jennie was director of sales and marketing for a \$3 billion bank holding company, sales manager for a high-performing mid-level Indianapolis bank, and director of corporate training for a large Midwest insurance company.

Managing a Successful Branch

Overview

Branch Manager Part 1 focuses on the foundation skills of a branch manager. Managers learn the key elements of managing a successful branch – selecting the team, staffing and scheduling, procedures and building the team.

Participant Key Skill Transfers to Take Away

1. Learn to create an energetic and productive workplace.
2. Learn to manage the branch team and integrate technology to drive additional business.
3. Drive business development even when the branch traffic is slow.

Program Agenda

- **Branch Staffing Model – Layers are Collapsing**
- **How Technology is Revolutionizing Our Business**
- **Vision Review – Our Role as Dream Builders**
- **Defining the Performance Management Process**
- **Coaching, Counseling, and Disciplining**
- **Scheduling and Staffing in Today's Work Environment**
- **The Bored Board Concept – “Go To” List for Slow Times**
- **Creating a Fun Work Atmosphere**
- **Generational Approach to Communicating**
- **Challenges and Opportunities**
- **Complete an Action Plan for Skills Transfer Back to the Job**

Leading Service Excellence

Overview

Branch Manager Part 2 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.

Participant Key Skill Transfers to Take Away

1. Develop leadership skills to grow the branch.
2. Master an understanding of a leading a vibrant service and sales process in a branch environment
3. Learn to train the branch team in key listening, referring, and selling skills to improve growth

Program Agenda

- **Review Action Plan Successes from Past Session**
- **Vision Review** – Hear the Dream, Pick the Product
- **Red Carpet Exercise** – Create a Memorable Experience
- **Rhythms & Routines at the Branch:** The following meetings take less than one hour per week to facilitate, and they positively impact the other 39 hours to increase business development activities by all team members.
 - Introduction to Dream Building (helping clients by listening)
 - Weekly Sales Meetings (What dreams did we find last week? How did we change a life?)
 - Morning and Afternoon Huddles (driving energy at the beginning and end of each day)
 - Mid-Week Clinics (brief gatherings with a learning topic facilitated by subject matter experts)
- **Service and Sales Leadership** – Identifying the Challenges to Expect When Driving a Service and Sales Culture at the Branch
- **Discuss Challenges and Opportunities**
- **Complete an Action Plan for Skills Transfer Back to the Job**
- **TOOLKIT: Mini Lesson: Listening for Opportunities** – Learn how to get the branch staff to listen and refer so we provide our clients the benefits they are seeking from us: save money, make money, save time, and provide convenience and security

Business Development

Overview

Branch Manager Part 3 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.

Participant Key Skill Transfers to Take Away

1. Master pre-call planning.
2. Learn to call virtually or in-person on the right (most profitable) clients and prospects.
3. Build relationships with productive referral sources.

Program Agenda

- **Introductory Discussion: Our Role in Growing the Branch**
- **Review Action Plan Successes from Past Session**
- **Our Past Calling Successes and Challenges**
 - The Value Proposition
- **Call Planning on Our Most Profitable Clients**
- **Gaining the Virtual or In-Person Appointment**
- **Planning for a Quality Encounter**
 - Determining Lead Officers and Call (Individual or Joint) Strategy
 - Plan What to Have With You during the Call
 - Plan Bridging and Introductory Comments
- **The Initial Meeting**
 - Listening and Communicating How You Can Help
 - Making a Recommendation and Asking for the Business
 - Earning Referrals
- **Call Follow-Up**
 - Expand Your Notes to Capture the Call
 - Calendar Follow – Up Activities
 - Assess the Call
- **Discussing an Upcoming Client Call**
- **Discussing Challenges and Opportunities**
- **Complete an Action Plan for Skills Transfer Back to the Job**
- **TOOLKIT: Forms for Use Back on the Job**

Maintaining Superior Team Performance

OVERVIEW

Branch Manager Part 4 focuses on maintaining superior performance. Managers learn to evaluate individual performance and build performance standards that blend with the company's mission and vision.

Participant Key Skill Transfers to Take Away

1. Explore winning motivational strategies.
2. Learn best practices in employee development, performance improvement, and employee recognition.

Program Agenda

- **Review Action Plan Successes from Past Session**
- **Conducting Performance Appraisals**
 - Discuss the Formal Appraisal Process at Your Company
 - Look at the Steps in Conducting a Performance Appraisal
 - Review a Sample Performance Appraisal Written by Branch Managers
 - What to Do When Things Go Awry
 - Managing Difficult Situations During a Review
- **Managing Conflict**
 - Structured Intervention
- **Rebalancing the Culture**
- **Delegating to Build Your Team**
- **Mentoring the Team**
- **Performance and Development**
- **Recognition and Reward – Nonmonetary and Monetary**
- **Understanding the Challenges Facing the Financial Workforce of Today**
- **Program Summary**
- **Complete a Final Action Plan to Grow the Branch**