

ABOUT US

We started in 1926, 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 have 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 are 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

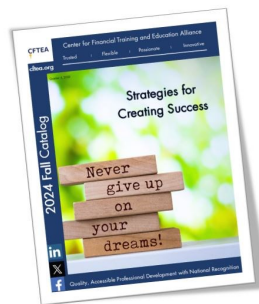
2024 MAY

CFTEA INSIDER

WHAT'S INSIDE

- Changes to CFTEA Student Award Dinners
- 2024 Academic Year Reminder
- Introducing—Upping Your Professional Game Bundle
- 2024 Leaders Conference
- New and Updated Courses
- Virtual Classroom Schedule (September—October 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!](#)



2024-2025 CERTIFICATE AND DIPLOMA CATALOG

What requirements have changed with certificates and diplomas?

Stay tuned this summer for the latest update to CFTEA's Award Catalog!



REMINDER: 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.

UPPING YOUR PROFESSIONAL GAME BUNDLE



Do you know any young people that are feeling overwhelmed by the transition to the working world?

The "[Upping Your Professional Game Bundle](#)" is the ultimate toolkit for adulting success. It includes: [Essential Life Skills eBook](#), [Managing Anxiety Handbook](#),

[Managing Emotions in Times of Stress and Uncertainty](#), [Resilience in Challenging Times](#), [Social Confidence Workbook](#), [Top 10 Financial Habits That Matter Most](#), and [Why Didn't Anyone Tell Me Life Lessons eBook and Workbook](#).

A limited time offer of \$99! This is the chance to impress a boss with maturity and self-awareness, navigate the workplace with confidence, and develop healthy habits.

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:
162

Value Provided:
\$21,648

“

“Age is only a bad thing if you’re not growing professionally. Period!”

”

UPCOMING: 2024 LEADERS CONFERENCE

Join the 2024 CFTEA Leaders Conference

Theme: Strategies for Creating Success

September 25 & 26, 2024
Village by the Sea | Wells, Maine

Board and Council members invite those with a passion for education to an opportunity to share best practices in learning & development, engage with peers, and find solutions!

[Click to Learn More!](#)

cftea.org

CHANGE AHEAD: COURSE UPDATES

The following courses have been updated for awards!

[BSA for Operations](#)

[Engaging Adult Learners](#)

[Frontline Fundamentals](#)

[Mortgage Fraud Detection, Reporting, and Prevention](#)

[Responding to an RFP \(Request for Proposal\)](#)

[Understanding Generational Differences](#)

[Understanding SBA Loans and Eligibility](#)

[Virtual Delivery for Educators](#)

[Your Role as a Professional Banker](#)

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

Accounting Basics

Commercial Loan Documentation

Commercial Loan Structuring

Ethical Issues for Bookkeepers

Exploring P2P and Digital Payments Systems

Fundamentals of Bookkeeping

Fundamentals of QuickBooks Online

Home Equity (Open End Credit)

Safeguarding Customer Information and Non-Public Areas

Wire Transfers

VIRTUAL CLASSROOMS



September 2024

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager starts 9/17/2024](#)

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager starts 9/18/2024](#)

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager starts 9/26/2024](#)

October 2024

[Legal Foundations in Banking Virtual Classroom starts 10/2/2024](#)

[Calming Upset Customers and Co-Workers 10/2/2024](#)

[Outside Calling School for Branch Managers, Lenders, and Business Development staff starts 10/2/2024](#)

[Calming Upset Customers and Co-Workers 10/8/2024](#)

[Principles of Banking Virtual Classroom starts 10/17/2024](#)

[Outside Calling School for Branch Managers, Lenders, and Business Development staff starts 10/17/2024](#)

[Written Communication Virtual Classroom starts 10/22/2024](#)



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

PRESENTED BY CFTEA & FOCUSED RESULTS

Upcoming
Spring Series!

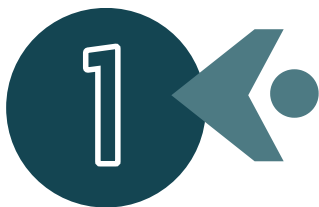


BUY NOW

WHO SHOULD ATTEND?

New and experienced branch managers, Assistant branch managers, teller supervisors, lead frontline professionals and any professional aspiring to lead the team in a retail branch

TOPICS:



MANAGING A SUCCESSFUL BRANCH



LEADING SERVICE EXCELLENCE



BUSINESS DEVELOPMENT



MAINTAINING SUPERIOR TEAM PERFORMANCE

INTRODUCTION

WISH TO GROW
YOUR TOTAL
ASSETS IN
EXCESS OF
20%
YEAR OVER
YEAR?

WISH TO GROW
YOUR DEPOSIT
BASE BY MORE
THAN
20%?

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!

TOPIC 1: MANAGING A SUCCESSFUL BRANCH

OBJECTIVE:

Branch Manager Topic 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 AND TAKEAWAYS:

- 1 LEARNING TO CREATE AN ENERGETIC AND PRODUCTIVE WORKPLACE.
- 2 LEARNING TO MANAGE THE BRANCH TEAM AND INTEGRATE TECHNOLOGY TO DRIVE ADDITIONAL BUSINESS.
- 3 DRIVING 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 & Opportunities
- Complete an Action Plan for Skills Transfer back to the Job

TOPIC 2: LEADING SERVICE EXCELLENCE

OBJECTIVE:

Branch Manager Topic 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 AND TAKEAWAYS:

- 1 DEVELOPING LEADERSHIP SKILLS TO GROW THE BRANCH.**
- 2 MASTERING AN UNDERSTANDING OF A LEADING A VIBRANT SERVICE AND SALES PROCESS IN A BRANCH ENVIRONMENT.**
- 3 LEARNING 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
- Introduction to Dream Building (Helping clients by listening)
- Weekly Sales Meetings (What dreams did we find last week? How did we change a life?)
- AM and PM 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 & 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 help our clients save money, make money, save time, & find convenience and security.

TOPIC 3: BUSINESS DEVELOPMENT

OBJECTIVE:

Branch Manager Topic 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 AND TAKEAWAYS:

- 1 MASTERING PRE CALL PLANNING.
- 2 LEARNING TO CALL VIRTUALLY OR IN-PERSON ON THE RIGHT (MOST PROFITABLE) CLIENTS AND PROSPECTS.
- 3 BUILDING 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 & 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 & Opportunities
- Complete an Action Plan for Skills Transfer back to the Job
- **TOOLKIT:** Forms for use back on the job

TOPIC 4: MAINTAINING SUPERIOR TEAM PERFORMANCE

OBJECTIVE:

Branch Manager Topic 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 AND TAKEAWAYS:

1

WINNING MOTIVATIONAL STRATEGIES.

2

LEARNING 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 & Development
- Recognition and Reward – Non-Monetary and Monetary
- Understanding the Challenges Facing the Financial Work Force of Today
- Program Summary
- Complete a Final Action Plan to Grow the Branch

MEET YOUR PRESENTER

JENNIE SOBECKI



Jennie Sobeki is 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, she 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. Prior to joining Focused Results, she 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. A charismatic speaker and consultant, Jennie consults with numerous financial service organizations on revenue, sales, sales leadership, and organizational performance.

PROGRAM DATES:

Summer Series 1

- 1 - May 22
- 2 - June 20
- 3 - July 17
- 4 - August 21

Fall Series 1

- 1 - September 18
- 2 - October 23
- 3 - November 13
- 4 - December 11

Spring Series 1

- 1 - January 14
- 2 - February 12
- 3 - March 12
- 4 - April 16

Summer Series 2

- 1 - May 23
- 2 - June 27
- 3 - July 25
- 4 - August 29

Fall Series 2

- 1 - September 26
- 2 - October 31
- 3 - November 21
- 4 - December 19

Spring Series 2

- 1 - January 30
- 2 - February 27
- 3 - March 20
- 4 - April 24

Summer - Pacific

- 1 - May 21
- 2 - June 18
- 3 - July 16
- 4 - August 20

Fall - Pacific

- 1 - September 17
- 2 - October 22
- 3 - November 12
- 4 - December 10

Spring - Pacific

- 1 - January 14
- 2 - February 11
- 3 - March 11
- 4 - April 15