

Branch Manager's Letter

strategies for branching excellence

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Coach for Career Development and Engagement

“Coaching to the numbers causes a real disconnect for the leader as well as the individual,” contends Cathy Maday, Speaker and Leadership Communication Coach for Wingspan Coaching Corporation (Charlotte, NC). “Numbers don’t ‘drive’ an individual’s performance. Recognition, compensation, achievement and contribution, praise – these are the real drivers.”

Too often, leaders only associate coaching with improving sales numbers or working with poor performers. But taking that position limits how powerful and effective coaching can be. A proactive coaching program that focuses on empowering an individual with awareness, insight, feedback, tools and consistent accountability in their application can enrich both personal and professional lives.

The Ultimate Win-Win

“Coaching for career development and engagement is essential! It helps to create the ultimate win-win,” Maday says. “Employees feel more valued, fulfilled and supported in their lives as a whole. The organization gets employees who take more ownership and initiative and who consistently and joyfully lead and perform with integrity.” The goals and values of both the individual and the

company are in alignment, honored and achieved.

Employees want to feel fulfilled and that they are contributing to something bigger than themselves. They want to be valued, empowered and supported.

“Coaching should be a powerful, effective and proactive resource that focuses on an individual’s whole life agenda,” Maday says. “Professional impacts personal and vice-versa. The most effective coaches intentionally and collaboratively link the employee’s goals (increased success, satisfaction, balance) to the organization’s goals (increased sales numbers, improved performance). It’s the best way to create the win-win.”

When you coach with career development in mind, people are more engaged. They are more aware of their contributions. They’re working towards a larger goal. A Branch Manager goes up to a new teller and says, *What are your career goals, whether in the institution or outside of it?* That’s a huge factor in establishing trust!

“Whether the individual’s career goal is aligned with what you envision or not, the person can be engaged. They can have fantastic performance, valuable contributions,” Maday says. “It’s a complete win-win until the day they leave.”

Self Leadership Is Key

“The main focus of coaching is Self Leadership,” believes Maday. “It’s a fan-

tastic shift for Branch Managers and others to see themselves as leaders. If you're a Branch Manager, what takes it to a completely new level is talking with your team about their own leadership. They begin to see their responsibilities differently."

The more you can coach employees to step into and grow in Self Leadership is a win-win for everybody. "Helping people see how valuable and how powerful they are – those are tools that I teach them. The Self Leadership tools are all surrounded in relationships and communication," Maday says. "You find out what matters to that employee. When you prompt that person for a change in behavior or to improve performance in a certain area, you can link it to something he or she cares about."

When you're able to help employees understand that their career development and satisfaction is their responsibility, they take the initiative and are more receptive to feedback and accountability. With Self Leadership, the manager moves into a support role. Then you can coach them on *this is your piece...how would you like for me to support you?* Employees begin to understand their power and that personal responsibility equals personal power.

Effective Strategies

To coach for career development and engagement, Maday advises:

- Create safety.
- Recognize that even your thoughts are a form of communication. Those thoughts shape everything in your life...and that includes how you coach and support your team.
- Ask questions! Invite the employee to clearly identify and express their true personal and professional goals.
- Ask more questions. Don't think that a couple of questions will *get the job done*. Be curious and stay curious! Stop

assuming that you "know" what the person means, where they are coming from and what they want. You don't. And even if you did, sometimes the greatest benefit in asking questions is to help the person learn to process and think through their own answers. "Many people do not know what they really want nor are they able to clearly articulate it openly and truthfully," notes Maday.

- Communicate the goals of the branch and/or organization.
- Discuss together how to align the employee's goals with the organization's goals.
- Establish a win-win action plan.
- Help the employee understand and agree that their career growth, success and satisfaction are their responsibility and that you are in the support role. The organization provides the tools and resources to help the individual create their success.

EXAMPLE: Here's one way to communicate this:

"In our culture at XYZ Bank, each individual gets to be in charge of their professional success and satisfaction. We believe in the Self Leadership concept *I am responsible for myself and I am responsible to others*.

When it comes to your goal achievement, your professional development and your personal growth, you are responsible for taking the initiative in clearly stat-

ing your goals, establishing alignment with the organization's goals, and creating the support that best serves you. So, you are in the primary owner's role and your manager and the organization as a whole are in the support role.

For example, we expect you to take the initiative to contact your manager and request meetings on a consistent basis so you are able to obtain useful feedback and tap into accountability that will help you gain momentum. We also look to you to outline what training and development resources you think will best serve you in your development and will best serve the goals of the organization. Does this make sense?

I, as your manager, am excited to support you in any way I can. Here's what my support might look like...asking provoking questions to help you state your goals, challenging you to get out of your comfort zone and take action, and giving you direct and honest feedback. Are you ready for that?!

I will also support you by having an open door, and I will create a safe place for you to stretch, learn and make mistakes along the way. If you find that you want different support than I am giving, will you let me know? Together we will find a way to work together well on your path to success."

- Resist the temptation to care more for the employee's success than the employee does. This is short-sighted and

Intuition and Spaghetti

"Pay attention to your intuition and 'voice it,'" advises Cathy Maday, Speaker and Leadership Communication Coach for Wingspan Coaching Corporation (Charlotte, NC). "I tell my clients to think of intuition as spaghetti. You know, when you're cooking spaghetti and you throw it on the wall to see if it sticks? I still do this."

When you say out loud to someone...

- *I get the sense that there is some resistance for you.*
- *I get the feeling there's something you're not telling me.*

...you're tossing it out there to see if it sticks.

Even when you give people feedback, you can see if it sticks. The important thing is you let go of the need to be right! You just toss it out, no attachment. "The benefit is in having the other person 'check in' with themselves. If what you share with them is 'not true for them,' then they are able to strengthen their conviction," Maday continues. "If what you share with them 'sticks,' meaning it bothers them, it has them thinking...it

sets both of you up for failure and frustration.

→ Provide consistent, timely, useful feedback and accountability.

→ Ask if the support you are providing is what the individual finds most helpful. If not, ask *Will you be sure to let me know how I can best support you?* And, wait for an answer. (This creates a bi-lateral agreement and creates safety.)

→ Celebrate and acknowledge progress along the way! Do not look for perfection. Consistently revisit and revise the goals, allowing for the natural maturation and evolution of them.

Wingspan Coaching Corporation (www.wingspancoaching.com) challenges and empowers clients to consciously see how valuable and powerful

they are and to live and lead from the place of Self Leadership. The firm provides solutions through coaching, speaking and training.

About 25% of Wingspan's coaching clients are Branch Managers with another 25% being President/CEO/NP/ Director level in banks or credit unions.

To contact Cathy Maday, call 1-704-281-3111 or e-mail cathy@wingspancoaching.com.

Do You Value, Hear, and Support Your Team?

“**W**hen you coach for career development, you discover what an individual wants for themselves...or at least you create the safety to help the person start identifying what they want,” observes Cathy Maday, Speaker and Leadership Communication Coach for Wingspan Coaching Corporation (Charlotte, NC).

Bank XYZ is one of Maday's clients and Amanda, a Branch Manager, is a participant in the Wingspan Coaching program.

...“Amanda told me about Janie, a teller with a go-getter, positive attitude that was consistently performing well and taking initiative. This was an improvement for Janie since Amanda started managing this branch. Janie had not displayed substandard performance; she simply seemed “passively engaged.” She did the bare minimum with low motivation. What prompted this improvement?”

Amanda chose to apply Wingspan's “coach approach” tool in her leadership with team members. She began monthly one-on-one meetings with each team member where she shared her expectations, provided feedback and took time to ask each individual what their long-term professional goals were.

Janie said that she eventually wanted to work in the Audit Department. Amanda asked more questions (part of the coach approach) to help Janie identify an action plan for achieving this goal. Amanda also asked Janie what she could do to support her in reaching the goal.

That was six months ago and this past week Amanda shared the bittersweet news with me that Janie is in fact moving to the Audit Department. I call it bittersweet because Amanda truly valued Janie as a team member she could really count on to perform with excellence and leadership in her duties as well as every interaction with clients and coworkers. Amanda's going to miss her. At the same time, she's incredibly proud of her and she's proud of herself.”

Everyone Wins

To sum up the win-wins:

Amanda created a working relationship with Janie that was full of respect, trust and cooperation.

Amanda stepped up her leadership by supporting Janie in getting to the next level as well.

Bank XYZ had a teller with superior client service skills and her experience and leadership is being brought to another department in the bank – a talented individual who gladly contributes to the overall success of the bank.

Janie speaks highly of Bank XYZ to her friends, family and colleagues. This also fosters a positive environment for clients and other team members at the bank.

Janie helped in recruiting a solid replacement for her at the branch.

Powerful Motivator

When Maday asked Amanda how this approach impacted Janie's performance, she replied, “Without a doubt, she was more motivated to perform well, learn new things and strengthen her leadership because we helped her to see clearly how these things would absolutely support her in reaching her overall goal.”

Maday also asked Amanda what this leadership style did for her working relationship with Janie. She answered without hesitation, “Mutual trust, respect, honesty, greater teamwork and open communication. I hate

to see her go (to the Audit Department) at the same time, I'm really happy for her!"

On the flip side, Janie opened up to Amanda and said that she had

proactively communicated her goal several times to her previous manager and received no acknowledgment or support in it. Not being valued, heard and supported was a real downer and

Janie found it hard to be motivated to do more than the bare minimum.

Find Out What Matters To Employees

You want an employee to change behavior or improve performance in a specific area. Just giving feedback and demanding change makes employees feel like they're being told what to do.

"How much time, energy, effort and heart do you think people will put into that? They think that all the organization cares about is making more money and that they're just a number," maintains Cathy Maday, Speaker and Leadership Communication Coach for Wingspan Coaching Corporation (Charlotte, NC).

Finding out what matters to employees is vital in creating positive ownership/buy in on their part. People take more initiative and responsibility when leaders invest time and effort in linking change to personal needs and goals. "Ask questions and then ask more questions during the coaching process. This is the phase where personal and professional goals are flushed out," says Maday.

EXAMPLE: Tessa's personal goal was to greatly reduce her stress and to eliminate her headaches and anxiety attacks. The bank's goal was for Tessa to consistently have confidence in communicating her excellent ideas and solutions and to be a more powerful leader.

The result? All goals have been achieved in the first five months of her coaching. She's been promoted and she is more successful and fulfilled in her leadership roles at the bank, her home and her church and other volunteer initiatives. Tessa is

more committed than ever to the overall success of the organization.

Making the Link

What if the employee's career goals don't match what the leader envisions? Say the employee wants to be an artist or attend nursing school. "When you drive an individual toward a goal that he or she has no or low interest in, it's a recipe for failure, frustration and resentment – for both of you," warns Maday.

To create successful linkages, Maday offers these tips:

→ Collaborate and establish the links together.

→ Let go of the need to have all the answers. It doesn't work that way and it puts more pressure on both parties.

→ Ask questions! Examples are:

- What's most important to you in your career?

- How do you define success for yourself?

- How might your improvement in [client service] serve you in achieving your goal of [becoming a nurse]?

- How could you achieve both of these goals together?

What about Sales Goals?

Even when team members have career goals outside of the branch, sales numbers can still be linked to their career development. "Find out what matters to the individual. Then help them see the connection between how the skills they use for sales numbers will serve their personal goals," says Maday.

EXAMPLE: John's personal goal is to get his degree and transfer to the Accounting Department. Working in Accounting includes interacting with various departments on budgets, cost justification studies, etc.

Sales skills can help John better present the benefits of budgetary decisions, etc. to departments. As he moves into management, sales skills can help him better communicate and

Losing E-Mail Can Cost You Sales Opportunities

When employees leave, be sure to forward their e-mail to an appropriate person. Clients and prospects may be used to communicating with the employee via e-mail.

EXAMPLE: Here's what one BML subscriber did....the bank forwarded the employee's e-mail and issued an auto response to senders specifying who received the message.

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“sell” his team on new concepts, processes, etc.

Creating Emotional Safety

“Creating emotional safety engenders respect, trust and openness from others,” asserts Cathy Maday, Speaker and Leadership Communication Coach for Wingspan Coaching Corporation (Charlotte, NC). “If we want ourselves and others to change in any way, shape or form, creating safety helps tremendously in achieving that faster, easier and more smoothly.”

When Maday works with clients, she helps them learn how to create safety for themselves as well as for others. “A deliberate path of growth and development in our leadership of self and others requires calling on our courage and taking some risks to see ourselves honestly, see things differently, letting go of old patterns and doing things differently. We are out of our comfort zones!” says Maday.

Emotional safety fosters the most fertile and productive “space” for this stretching of ourselves. Creating safety has many levels and facets to it. It means making space for...

- Openness

- Honesty
- Trust
- Courage
- Realness

Safety also means allowing for mistakes to be made and learned from. It values progress rather than perfection. It means understanding that each and every person is doing the very best he or she can with the knowledge, wisdom and awareness they have. Safety involves no judgment, no blame, no shame, no perfection, and no justification.

Tips for Success

To create emotional safety, Maday advises:

- Be open and honest with yourself first.
- Choose to come from a place of love and growth instead of fear and protection.

➤ Be curious and stay curious. Stop convincing yourself that you *know* things about others. “Being curious means asking meaningful questions from a genuine place,” notes Maday.

➤ Let go of the need to have all the answers.

➤ Let go of the need to be right.

➤ Honor and appreciate others where they are at, trusting that they are “there” for many good reasons. The same holds true for you.

➤ Stop asking *why*. Wingspan Coaching programs include The Language of Leadership. The “Unvocabulary List” consists of words that clients are encouraged to remove from their vocabulary because they do not create safety, nor do they support us in making strong clear decisions. Furthermore, some words do not help us “get heard,” inspire, and lead others in a powerful and attractive way.

The Unvocabulary List includes *but, however, should, need to, have to, right, wrong, or, try, and can't*.

When Clients Grumble About Interest Rates

With interest rates declining, be sure to prep employees on how to respond when clients grumble. Consider sharing these tips:

- ★ **Be responsive.** It lets clients know that you care about how they feel and what is important to them.
- ★ **Pay attention to all comments.** Even if clients are criticizing rates, their comments help your institution evaluate how effectively it's addressing the situation. *EXAMPLE:* The competition may be offering a special and management isn't aware of it.
- ★ **Show empathy.** Respect your client's right to question or dislike the interest rate.
- ★ **Know your institution's position on negotiating rates.** If you don't negotiate rates, sound positive when telling clients. Instead of saying *that's not our policy*, reassure clients that you try to stay competitive with the market.

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5 ★ **Make a referral if appropriate.** The Investment department may offer clients opportunities to earn higher rates through annuities, mutual funds, bonds, etc. *TIP:* Because investment products do carry risks, be sure to find

High Performers Reach Out To Prospects

“High performance is definable, quantifiable and achievable,” states Ron Buck, CEO of Solonis Center for Excellence (Scottsdale, AZ). Four years ago Solonis began an unprecedented research program to empirically determine the key ingredients of frontline high performance. The *Solonis 300 Performance Benchmarking* study involved more than 1,000 branches, including 300 that met Solonis’ criteria as high performers.

Findings include the best practices of the highest performing branches (and Branch Managers) and how these high performers balance current client, employee and operational priorities while consistently out-performing their peers in deposit growth, loan growth and profitability. Solonis’ research provides the first national benchmarks for over 80 sales key performance indicators and unprecedented insights into the habits that make branches outperform their peers.

Defining High Performance

High performance is more than winning a sales contest! High performers deliver results consistently and for the long term. Buck says...

➤ High performing branches outperform industry peers – as measured by their ability to sustain both growth and profitability – over the long-term (industry cycles, leadership cycles and interest rate cycles).

➤ Sustained out-performance in both growth and profitability is a competitive reality today and is the hallmark of the “highest performers”. In the past, a traditional issue of lead-

ership was determining when or if a financial institution should go for growth or profits. Solonis’ research reveals the highest performers consistently out-perform their peers in both growth and profitability over the long-term.

➤ Many branches will see spurts of growth or gains in profitability during a product promotion or a new incentive program. But the highest performers are able to sustain both growth and profitability over the long term.

Being Proactive Pays

“Proactively reaching out to prospects and existing clients is the most critical driver of sustained growth and profitability,” emphasizes Buck. Key findings from Solonis’ research includes...

☐ High performers diligently track, measure and scorecard three specific performance indicators of deposit or loan growth. They are:

1. Opportunity creation
2. Opportunity management
3. Opportunity retention

In other words, the highest performers know that they must see more new opportunities, manage them better – as measured by win/loss ratio and products/opportunity – and ultimately retain their new opportunities.

☐ Branch sales opportunities are generated...

- When a client walks in the lobby and requests a new product
- When a branch employee makes a referral

▪ Through some prospecting activity

▪ Periodic follow-up with the client that usually is part of the onboarding process

☐ Solonis divided branches into three groups: the Highest Performers (top 10%), the Median Performers, and the National Average. The Highest Performers sustain deposit and loan growth rates that are about 10 times higher than the National Average and are about 4 times more profitable.

☐ The Highest Performing branches sustain these growth rates and levels of profitability because they proactively create 60% of all their new opportunities (with referrals, prospecting and periodic follow-up). This compares to 30% for Median Performers and only 8% for the National Average. This means that the Highest Performers are 8 times more proactive about connecting with their clients than the National Average.

☐ The National Average branch waits for the client to walk in the lobby and ask for a product. The National Average branch gets 92% of all its new opportunities by this method. The Highest Performers are just the opposite. They are significantly more proactive (referrals, prospecting and periodic follow-up) and the results are dramatic!

3 Ways To Create Opportunities

Branches can create new opportunities through...

1. Referrals. Solonis' research reveals that 76% of clients who walk into the lobby are in the middle of a life event that is driving them to make a financial decision. This life event can be a birth, marriage, divorce, retirement or something as simple as a car accident. This means that 3 out of 4 clients talking to the teller every day have a financial need and are looking for help. The Highest Performers are listening and are ready to help. The National Average teller is more focused on making a fast and efficient transaction and balancing her drawer.

2. Prospecting. The Highest Performers make prospecting a priority.

3. Periodic follow-up with the client. This includes both reboarding sales activities and onboarding. Solonis' research reveals that while most Branch Managers say their employees onboard new clients, in reality almost no clients are onboarded. However, research reveals that the first 60 days after a purchase is the optimum time to cross-sell additional products.

Coaching Is Key

"Coaching from the Branch Manager is the most important habit of high performance," says Buck. Best practices related to coaching and new opportunity management include:

→ Develop a coaching process that includes setting expectations for new opportunity creation (referral management; prospecting and periodic follow-up). Set realistic growth expectations for each employee. These expectations will be different for every employee. If employee expectations are too low or too high there will be no motivation.

→ Hold an employee accountable for his or her role in new opportunity creation. This accountability should be a process. This process begins by defining exactly what and how an employee will be held accountable. Specifically, this includes what behaviors you are looking for and how you will measure and provide feedback.

EXAMPLE: Tellers often send a referral and nothing happens. The Branch Manager must hold someone accountable for taking quick action on every referral. This requires an ability

to track specific performance indicators for periodic feedback.

→ Provide regular and spontaneous feedback relative to expectations and accountabilities. This feedback should include accurate information, advice for improvement and motivation.

Committed to delivering innovation, the Solonis Center for Excellence (www.solonis300.com) collaborates with clients to help them achieve high performance. Our professionals leverage practical experience and best practices to identify opportunities for performance improvement. With deep industry experience and a proven track record, the Center for Excellence can mobilize the right people, skills and technologies to help clients improve performance.

Many recognized industry leaders are learning from Solonis what it takes to be a high performer. Solonis has developed a reputation for its innovative approach to high performance and leading financial institutions are taking notice.

To contact Ron Buck, call 1-480-212-6082 or e-mail rbuck@solonis.com.

6 Habits of High Performers

"Dramatically new front-line behaviors are redefining branch performance and the client experience," observes Ron Buck, CEO of Solonis Center for Excellence (Scottsdale, AZ). The *Solonis 300 Performance Benchmarking* study identified six "Habits of High Performers". These are the habits that have generated sustained deposit and loan growth over a period of four years.

The six habits are:

1. Sales Tracking and Measurement. The highest performing institutions and Branch Managers understand what is important to measure and the importance of sales tracking, reporting and score carding. What they measure is totally different than other institutions.

2. Alignment. The highest performing institutions and Branch Managers align training, coaching, sales processes and incentives. They have

all developed formal or informal alignment methodologies.

3. Continuous Process Improvement. The highest performing institutions and Branch Managers are continuously involved in sales process improvement. They generally focus on various combinations of these processes.

4. Coaching. The highest performing Branch Managers are all willing to change and are committed to action. They exhibit three impor-

tant coaching characteristics that are the foundation for a positive branch environment...

- They set realistic expectations on an individual basis.
- They know how to hold their frontline employees accountable for creating new opportunities.

- They provide immediate feedback to their employees. This feedback is motivational, informational and developmental.

5. Incentives, Rewards and Recognition. While most institutions are focused on product-based incentive programs, the highest performers

reward performance improvement based on specific key performance indicators.

6. Balance, Align and Renew. The highest performing Branch Managers continually balance, align and renew variations of these habits through a careful combination of insight and action.

Self Leadership... “Lead Self Then Lead Others”

“One of my core beliefs is *Lead Self then Lead Others*,” states Cathy Maday, Speaker and Leadership Communication Coach for Wingspan Coaching Corporation (Charlotte, NC). Her coaching programs reflect this belief as they challenge and empower participants to deepen and strengthen their relationships and communication with themselves as well as with others.

“Most people do not think in terms of having a *relationship* with themselves. This is the core of Wingspan’s Self Value, Self Create, Self Lead concepts,” Maday says. “In Self Leadership we become intentional in our relationships with ourselves and our relationships with others. We are always in relationships and we are always communicating.”

Foundation for Success

Key concepts of Self Leadership include:

- ❑ Live and lead from your true center or true self, instead of your *fearful protective parts*. This is very powerful in our relations with others.

EXAMPLE: Maday helps clients learn to come from a place of leadership by speaking *for* their parts in-

stead of speaking *from* their parts. A Branch Manager can calmly and confidently speak for her disappointment or frustration without speaking from that disappointment or frustration.

- ❑ Take full and absolute responsibility for yourself while being responsible TO others. You do not take care of others. You do not blame your results on others. You understand that you create and co-create each and every experience. Self Leadership means actively and deliberately taking the role of Leader instead of taking the roles of martyr, victim or villain.

- ❑ Accept and embrace that each of us is always *at choice*. Each of us is always doing the best we know how with the knowledge, understanding and awareness we have in the moment. There is no judgment of self or others. No blame or shame.

- ❑ Live from a place of love and growth rather than fear and protection.

- ❑ View feedback as a gift – get it, use it, give it.

- ❑ Take responsibility for getting heard.

- ❑ Make a real honest commitment to taking full responsibility for your life. Be purposeful and intentional in your self-awareness and consistently reach out to resources...learn and apply different mental models, thoughts, actions and behaviors that truly support you in creating the life you really want.

The “Drivers”

“I think that our deep desires are the drivers of Self Leadership,” says Maday. *EXAMPLES:* A person wants more respect from others, wants to be more fulfilled, wants to be less stressed and have more harmony at work or at home. These are the drivers to grow – to reach out to resources to learn and facilitate that. Career success and satisfaction are often core drivers of self-leadership.

“The drivers are most certainly different strokes for different folks,” Maday says. “When a client or trainee says *I want more success*, I reply with *What does success look like for you?* It’s the same with fulfillment, bal-

FREE Webcast

How does your branch rank with over 1,000 other branches? The Solonis Center for Excellence will host a FREE 1-hour Webcast on May 19 at 12:00 – 1:00 p.m. (Central Time) on branch level benchmarks.

Participants will gain access to sales benchmarks for all critical sales processes, best practices and specific frontline tactics that High Performers use to sustain both growth and profitability. Each participant will be e-mailed a detailed report of the Solonis 300 research.

To register for the Webcast, e-mail rbuck@solonis.com or call 1-480-212-6082.

Post Pictures of Known Robbers

Is your area suffering a rash of robberies? Post the robber’s picture on all doors and teller stations. Besides heightening employee awareness, it lets the robber know that your branch is on guard. Most robbers case a branch before actually committing the crime.

ance, peace, harmony, respect, love, a
promotion...”