

# Create & Coach Engaging Conversations in the Branch



March 13, 2024  
CBAI Headquarters  
Springfield  
~OR~  
On-Demand  
Recorded Session

# Course Introduction

With the flurry of deposit choices right now, many bank clients are shopping and hopping around, splitting their deposits among banks and fintechs. What if your bankers were better at relationship banking? Today's environment offers banks a great opportunity to drive increased engagement and relationships if you have the right people asking the right questions when your customers (or shoppers) come in the door, chat or call. Now more than ever, your bankers need a proactive process to initiate meaningful conversations. They must be skilled at asking important questions to take the focus off the rate and onto the client as a whole. Is your frontline staff ready?

Jack Kasel, sales development expert & community bank specialist with Anthony Cole Training Group, will introduce a new skill building, Retail Management Workshop, that is laser focused on helping you train your retail bankers to improve their relationship building skills. With the CARE program, leaders learn a 4-step sales training process including these components:

1. Confident Positioning
2. Assessing Needs
3. Recommending Solutions
4. Expanding Relationships

This program has been developed drawing from the book, *“Go-Givers Sell More”* and will be interactive with drill for skill and case study role plays. Leaders leave with the tools to take back and immediately utilize to impact your retail branch skills and productivity.

*\*Recommended pre-work for all participants.*

Tools:

- Workshop Deck – with notes
- 3 Videos for training staff
- CARE Placemat
- Follow up scheduled phone support with Jack



# About the Presenter

**Jack Kasel, with Anthony Cole Training Group**, has 30+ years of experience in sales and sales management spanning a host of industries including software, transportation, printing services, insurance, and training. During his tenure at FedEx, he oversaw all aspects of regional training prior to being promoted to district manager. Since joining Anthony Cole Training in 2014, Kasel has become one of our community bank specialists, helping our bank clients sell better, coach better and hire better. He brings deep experience of feet on the street, practical selling as well as a coaching and training background, to help banks improve their sales results and close their sales opportunity gap.



**KASEL**



# Registration Fees

## **CBAI MEMBER**

First registration.....	\$285
Each additional person.....	\$265 each
On-Demand Recorded Session .....	\$500 bank

## **\*\*PROSPECTIVE MEMBER**

First registration.....	\$485
Each additional person.....	\$465 each
On-Demand Recorded Session .....	\$1,000 bank

*CDD members receive a 10% discount on live attendance only.*

*\*\*Only financial institutions/firms eligible for CBAI membership.*

## **CANCELLATION POLICY**

Registrants cancelling two days prior to the seminar receive 100% refund. **ALL cancellations must be made in writing prior to the seminar day. Invoices and training materials will be sent to all “no shows.”** Fees include hand-out materials, refreshment breaks and lunch. An income-tax deduction may be allowed for educational expenses undertaken to maintain or improve professional skills.

## **SEMINAR MATERIALS/ON-DEMAND RECORDED SESSION**

Prior to the seminar, you will be emailed a link containing hand-out materials, seminar certificate, evaluation form and seminar attendee list. Please print and bring materials with you or download them on your own device to access during the program. CBAI will provide power cords in several designated locations to charge devices. *NOTE: If you have NOT received the link one day before the seminar, please email Melinda at [melindam@cbai.com](mailto:melindam@cbai.com) or via phone at 800/736-2224.* The on-demand recorded session will be emailed to participants approximately 7-10 business days after the live event takes place. Your entire bank can utilize this session for training as it includes the video from the day of the program, plus the exact same handout materials as the live session. For more information, please contact Melinda at CBAI Headquarters.

## **CONTINUING EDUCATION CREDITS**

If you have earned an ICBA Certification, CPE credit earned through your state banking association may be submitted for CPE purposes. Please note, approval is subject to review and must satisfy the respective certification requirements.



# Registration Form

## CREATE & COACH ENGAGING CONVERSATIONS IN THE BRANCH

\_\_\_ March 13, 2024

\_\_\_ On-Demand Recorded Session

Name of Bank \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Tel. No. \_\_\_\_\_

Name/Title \_\_\_\_\_

E-Mail \_\_\_\_\_

(E-Mail address required for registration).

Name/Title \_\_\_\_\_

E-Mail \_\_\_\_\_

(E-Mail address required for registration).

\_\_\_ I have special needs, please contact me before the seminar.

Please select your payment method.

\_\_\_ Check Enclosed

\_\_\_ Check in Mail

\_\_\_ Pay at Door

\_\_\_ Credit Card\*

*\*If you are paying by credit card, please fill out the following information.*

*(Visa, MasterCard & Discover accepted).*

Name as It Reads on Card \_\_\_\_\_

Company Name on Card \_\_\_\_\_

Billing Address of Card \_\_\_\_\_

Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Three Digit Security Code \_\_\_\_\_



Mail it in:  
CBAI Education Department  
901 Community Drive  
Springfield, IL 62703-5184



Fax it in:  
(217) 585-8738



Call it in:  
(800) 736-2224



Click it in:  
[www.cbai.com](http://www.cbai.com)

## Date and Location

March 13, 2024

OR

On-Demand Recorded Session

## Agenda

Registration begins at 8:30 a.m. The seminar runs from 9 a.m. to approximately 4 p.m. A continental breakfast and lunch are provided.

## Continuing Education

CBAI is a registered Public Accounting Continuing Professional Education (CPE) provider by the Illinois Dept. of Financial and Professional Regulation.

## For More Information

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