



# UNIVERSAL BANKER STRATEGIES VIRTUAL SEMINAR

**AUGUST 10, 2022**

**Why should a bank consider and implement universal retail banking?** Go stand in any retail branch lobby, count the customers, and you will find the answer. Today's retail branch is a valuable delivery channel and customer touch point that is rapidly declining. Customer expectations and increased technology are impacting retail banking. The strategy for retail brick and mortar banking must be revisited. Explore the answers to these questions (and more) during this interactive training session.

- How will a financial institution make the limited customer visits a memorable experience that is productive and profitable for both the customer and the bank?
- What does a universal branch look like?
- Does it require a complete redesign of the traditional branch?
- How can your bank adopt the universal banking model?

## THE P'S TO TRANSFORMING THE RETAIL BRANCH

### Philosophy

- Understanding the changing role of retail banking
- Drivers to transformation and implementation of the retail branch

### Preparation

- Ensuring Management's Commitment
- Developing a culture of personal banking
- Preparing the customer experience

### Process

- Implementation strategies and process
- Checklist to implementation of the universal experience
- Streamlining operations
- Marketing and merchandise

### People

- Preparing and onboarding internal team members for universal banking
- Interviewing for today's cross-trained, universal banker
- Training and developing the consultative universal banker

### Premises

- Selecting the appropriate technology
- Redesigning the retail branch considerations

### Performance

- Defining universal banking performance metrics
- Selecting rewards and recognition
- Ensuring sustainability

## WHEN

August 10, 2022  
9:00 a.m. - 4:00 p.m.

## WHERE

Comfort of your desk or  
anywhere with an internet  
connection.

## WHO SHOULD ATTEND

This program is designed for those responsible for implementing, leading, and delivering retail banking strategies. Those who would benefit from the program include – bank presidents, senior retail leaders, retail operations managers and administrators, training & development managers and coordinators, universal bankers, and retail managers interested in learning about the benefits and value of universal banking.



# Arkansas Bankers Association | Professional Development Department

1220 West Third Street | Little Rock, Arkansas 72201 | (501) 376-3741 | www.arkbankers.org

## About the Instructor



**Christie Drexler** is the Senior Consultant and Facilitator for Performance Solutions, Inc. She has over 26 years of experience in the financial industry for community, regional and national banks. Her experience has been expansive to include successfully navigating both retail and commercial banking careers. Her past roles include Commercial Banker, Regional Sales Manager, Chief Retail Officer, Chief Credit Officer, and Market/Division President. Christie is a passionate facilitator and coach with a focus on developing leaders in banking.

## REGISTRATION FEES

### ABA Members:

Early Registration Price: \$340; After July 13: \$390

### Non-Members:

Early Registration Price: \$680; After July 13: \$780

## CANCELLATION

Register before July 13 if possible. Full registration fees will be refunded if a cancellation is received before July 27. No refunds will be given for cancellations made after July 27. Substitutions are welcome and encouraged. All cancellations and substitutions must be submitted in written format prior to the event.

## VIRTUAL LIVE FORMAT

Attendees will need Internet access and a standard web browser to join this video and web conferencing. They will receive an email with a link to join the virtual meeting, handouts, and any additional information a few days before the event.

You do not need your own Zoom account. You will use the link, meeting ID and password we provide.

- You can log in on a desktop computer, laptop or download the Zoom app on your smart device.
- Internet access
- Audio on computer or a phone line

## UNIVERSAL BANKER STRATEGIES

AUGUST 10

Bank/Company Name \_\_\_\_\_ Phone \_\_\_\_\_

Registrant Name \_\_\_\_\_ Title \_\_\_\_\_ E-mail \_\_\_\_\_

Registrant Name \_\_\_\_\_ Title \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Registration Contact \_\_\_\_\_ Phone \_\_\_\_\_ E-mail \_\_\_\_\_

## PAYMENT INFORMATION

Charge my:  Mastercard   Visa   American Express   Discover 

Account Number \_\_\_\_\_

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

Expiration Date \_\_\_\_\_ CSC Number \_\_\_\_\_  
*(3-digit security code on back of your card)*

Billing Zip Code \_\_\_\_\_

**Email:** kami.coleman@arkbankers.org

**Fax:** (501) 376-9243

**Mail: Check Payable to:**  
Arkansas Bankers Association  
Professional Development Department  
1220 West Third Street  
Little Rock, AR 72201

### ABA USE ONLY:

Registered: \_\_\_\_\_

Amount: \_\_\_\_\_

Received: \_\_\_\_\_

If you would prefer to give us your credit card information over the phone, please call the ABA Professional Development Department at (501) 376-3741. Please do not email credit card information.

**Note:** Non-Members must pay with credit card or check prior to the event.