

# OBL In-Bank Training Program

**Date and Location:**  
To be determined by your  
bank and the OBL

## Program Highlights

Banks interested in the OBL In-Bank Training program can select from a number of quality, industry-specific training sessions that can be tailored to your bank's needs - whether for an hour, a day, or a week-long session. Customized programs are also available to fit your training needs.

Training is available for large groups, small groups, or one-on-one. The OBL can train an entire department or can focus on a "train the trainer" approach. Either way, the OBL will guide you in planning and arranging your training sessions.

Please see the back side of this brochure for a list of potential topics or contact the OBL for a consultation.



**Plan & Budget for Your Customized 2019 Session Today**

For years, bankers have attended valuable seminars, conferences and schools at the OBL Training Center in Columbus. For nearly a decade, the OBL has offered another component to its training strategy. The OBL will come to you to collaborate with your bank and/or additional banks in your area to meet your specialized needs. Through our In-Bank Training initiative, the OBL offers customized training solutions to your staff that is tailored to your bank's policies and procedures, as well as your institution's mission statement, values, tag lines and corporate culture. The OBL can deliver a wide variety of training directly or help identify the expertise to deliver more specialized training content to your bank's employees.

OBL In-Bank Training has many advantages. In-bank training programs are:

### Cost Effective

Training at your facility is affordable, and allows your employees to spend less time away from the office, while reducing employee travel and tuition cost.

### Convenient

Programs are scheduled according to your staff's availability. You decide what works for your schedule, which means more of your staff can attend.

### Consistent

Ensures everyone learns at the same level from start to finish, as your staff will hear the same message at the same time; and the same training can be repeated as needed for ongoing continuity.

### Easy to Coordinate

The OBL can use your bank's training room or can help you identify an off-site training facility.

### Team Focused

In-Bank Training sessions foster team building within your organization and department and will provide staff with the skills they need to succeed in their respective positions. Participants will appreciate the personal and professional development gained, and the experience will provide a revitalized commitment to their quality of work. And because new skills are practiced during the interactive and participatory workshops, your entire group can become productive quickly.

### About the Instructor

Julie Kiplinger, manager of professional seminars and in-bank training, is a seasoned bank trainer with more than 30 years of industry experience. Kiplinger, who coordinates the In-Bank Training program and often serves as lead trainer, holds a B.A. in Financial Management from The Ohio State University and is a Certified Trainer in Finance & Education in the State of Ohio. Prior to her role at the OBL, she served as the director of education and training at a community bank, where she was an internal course trainer and buyer for external training programs.

# OBL In-Bank Training Examples

## Training for Today's Market

Keep Employees Motivated through Change

Proactively Embracing Change

Managing & Creating Change

Leadership & Change

Performance Management Training

Serving Customers in Today's Market

Helping Customers Make Decisions

## Sales

Building the Customer Relationship

How to Look for Sales Opportunities

**IMPACT: How to Investigate, Meet, Probe, Apply, Convince, & Tie-Up the Sale**

How to Use Your Financial Institution's Advertising to Your Selling Advantage

How to Ask for the Business

How to Talk to Your Customer and Refer a Product(s)/Relationship Building

Serving the Senior Customer

## Soft People Skills

Building an Empowered Team

Coaching & Counseling for Excellence

Giving Productive Performance Appraisals

Supporting Career Development

Ensuring Continuous Improvement

Being the Complete Supervisor

Communicating Professionally

Getting the Right People in the Right Jobs

Commitment to Excellence

Building Better Work Relationships  
Supervision Training

## Teller Training

Talking to Your Customer

Communicating & Listening to Your Customer

Check Endorsement Standards

Handling Everyday Transactions

Proper Techniques for Handling & Counting Cash

Teller Drawer Balancing

## CSR/Customer Service Training

How to Handle & Overcome Objections

Building Better Customer Relationships through Communication

How to Identify Financial Needs

Helping Customers Make Decisions

Building Trust with Your Comfort Zone

How to Suggest & Recommend a Product/Service to Your Customer

How to Refer the Customer to the Appropriate Associate

Learn How to Recognize the Steps for Cross Selling Opportunities

Where to Find Prospects-Customers

Remember: This list provides examples of the types of training programs that are available. The OBL will work with you to customize programs to meet your training and development needs.

## What OBL Members Have to Say ...

Bankers find OBL In-Bank Training to be time well spent, as they gained insight into themselves and the jobs they perform each day. Some testimonials follow:

*The first time we engaged the OBL for in-house training I was surprised how easy it was to customize the training. I told them what specific type of training I needed and they hit it on the head. There was requested feedback during the training to make sure the program was what we needed for our employees. Our team walked away with invaluable training and they still use those skills today!*

Natalie Karas, Senior Vice President, The Arlington Bank

*Our institution was looking for some general management training to do in-house as we had about 15 managers who needed to participate. It's difficult as a community bank to always find the time to send managers for off-site training. The OBL In-Bank Training program is a wonderful alternative to off-site training. We used OBL In-Bank Training for the first time this year, and were very pleased with content as well as the instruction. Here are a just a few of the comments from my managers regarding the training:*

- "I thought the speaker did a great job and adapted well to her audience. I liked the fact that she took time to see what our expectations were before she started, as you don't see that happen too often with a speaker."*
- "I came away with some great ideas! Lectures like hers refresh your way of thinking as a manager!"*
- "She was very interesting to listen to and she kept it fun (especially with her stories). I appreciated the fact that she made it very relevant to what we deal with in the course of a day!"*

Jenifer Ford, Senior Vice President, Human Resources, Kingston National Bank

To speak with Julie Kiplinger about your bank's customized session, call 614-340-7612. She can also provide additional testimonials and/or references for the program.