

2022 OBL Retail Banking Forum



CULTIVATING IDEAS AND TOOLS FOR GROWING THE RETAIL DELIVERY BRANCHES AND CHANNEL

The OBL Retail Banking Forum provides a platform and an opportunity for retail banking officers to exchange ideas freely and examine pressing issues in today's ever-evolving regulatory, cost-conscious and result-driven environment. The agenda for each session is based on input from participants in the forum group and the facilitator. Also, as appropriate, experts will be involved and present specific timely topics as requested by forum members.

BENEFITS OF THE FORUM

- **Improve** your effectiveness as a Retail Banking Leader
- **Discuss** current industry challenges with others in Retail Banking
- **Develop** relationships with other Retail Banking colleagues
- **Brainstorm and Solve** your most pressing challenges
- **Deepen** professional development and learning curve
- **Discuss** with peers what does and does not work
- **Receive** CPE credits or Certificate of Completion

HOW THE FORUM WORKS

- The Retail Banking Forum will meet three times during the year.
- Relevant retail banking "hot topics" will be discussed at each session. Participants are strongly encouraged to suggest topics of interest.
- Forum participants benefit from working with a seasoned facilitator on a cost-saving basis.
- Attendees share best practices and solutions to retail banking challenges.
- Each attendee receives an electronic manual packed with tools, forms, handouts and templates.

PROGRAM FORUM TOPICS

- Building a retail banking branch and culture
- Current challenges with growing a retail branch
- Staffing and scheduling a retail branch
- Attracting and retaining retail staff
- Business Development: Increasing the pipeline, small business strategies and protecting key customers in today's environment
- Improving and maximizing the customer experience
- Employee engagement and development
- Emerging products, services and technology
- Growing the retail delivery channel: Value added and cross-selling, increasing non-interest income, on-boarding and re-boarding tools
- Balancing regulatory and compliance with generating revenue
- Performance Management: Metrics, goal setting and performance improvement processes.
- Topic input from Forum members

JOIN TODAY!

FORUM ATTENDEES ALSO
RECEIVE A SEAT AT EITHER THE
OBL WOMEN IN BANKING
CONFERENCE OR THE OBL
ANNUAL MEETING

PROGRAM FEE:

\$945 per OBL Member

THIS PROGRAM INCLUDES:

Retail Banking Forum Sessions

Tuesday, June 21

Tuesday, September 27

Retail Banking Forum sessions will be held at the OBL Education Center, 4215 Worth Avenue, Suite 300, Columbus, OH 43219, from 10 a.m. – 3 p.m.

2022 OBL Women In Banking Wednesday, October 12

The 2022 OBL Women in Banking will be held at the Hilton Columbus at Easton, 3900 Chagrin Drive, Columbus, OH 43219.

2022 OBL Annual Meeting Wednesday & Thursday, November 2 & 3

The 2022 OBL Annual Meeting will be held at Hyatt Regency Columbus, 350 N. High Street, Columbus, OH 43215

2022 OBL Retail Banking Forum



WHO SHOULD ATTEND?

This forum is designed for senior retail officers, retail branch managers and retail banking coordinators responsible for multiple branches/offices, as well as marketing directors with retail banking focus, and those responsible for leading the retail banking sales and service efforts of their banks.

ABOUT THE PRESENTERS

Performance Solutions, Inc. (PSI) is training and consulting company that has been a part of the banking community for over 35+ years. PSI specializes in providing solutions to the key challenges facing banks today in attracting and building profitable relationships with their customers. PSI's in-person, virtual and hybrid training and speaking engagements are described as energized, fast-paced, interactive and result-focused.



Christie Drexler is the Senior Consultant and Facilitator for Performance Solutions, Inc. Christie has over 26 years experience in the financial industry for community, regional and national banks. Her experience has been expansive to include beginning as a Management Associate, successfully navigating both retail, real estate, operations, treasury services, commercial banking careers and serving as Chief Retail Officer, Chief Credit Officer, and Market/Division President. Christie is a passionate facilitator and coach with a focus on developing competent, caring and impactful leaders in all roles of banking.



As a former banker, **Dianne Barton**, Founder & President of Performance Solutions, Inc., provides a full array of bank-specific learning solutions including leadership and management development, regulatory and compliance implementations, retail growth strategies, sales & service culture development, strategic planning, is recognized as "real world solutions" by both regional banks and community banks.

CANCELLATION POLICY

Refunds for the program will be granted for cancellations received in writing to education@ohiobankersleague.com seven days prior to each session. Cancellations will be subject to a \$75 processing fee. No refunds will be granted for cancellations received within seven days of the program. Substitutions are always welcome.



Visit www.ohiobankersleague.com
or scan the QR code above.

Questions?

Contact Julie Kiplinger at jkiplinger@ohiobankersleague.com

Registration Assistance?

Contact Sarah Husk at shusk@ohiobankersleague.com



The Ohio Bankers League is registered with the National Association of State Boards of Accountancy as a sponsor of continuing professional education on the National Registry of CPE Sponsors. This program and attendees qualify for Continuing Professional Education credit in the area of Specialized Knowledge.