

RETAIL MANAGEMENT WORKSHOP

MARCH 11 & 12, 2025

OBA MEMBERS: REGISTER ONLINE AT WWW.OBA.COM.

Earlybird fee by Feb 26: \$575

Regular fee after Feb 26: \$600

Non-members: \$1200

The fee includes instruction, materials, breaks and lunch. Cancellation requests must be made in writing and be received by 2/26/25 to receive a full refund. A 50-percent refund will be given on all cancellations received by 3/4/25. No refunds will be given on requests received after 3/4/25; however, substitutions may be made.

BANK/CO. _____

PHONE _____

FAX _____

P.O. BOX _____ CITY _____

ZIP _____

NAME _____

TITLE _____

EMAIL _____

NAME _____

TITLE _____

EMAIL _____

NAME _____

TITLE _____

EMAIL _____

PAY BY CREDIT CARD:

For security reasons, please e-mail your registration form and credit card information to:

secure e-mail: secure@oba.com

BILL TO VISA MASTERCARD AMEX DISCOVER

CARDHOLDER NAME _____

CARD # _____

EXPIRATION DATE _____ CVC# _____

SIGNATURE _____

PAY BY CHECK:

Mail this form with payment to:

Oklahoma Bankers Association

P.O. Box 960173

Oklahoma City, OK 73196-0173

SCHEDULE

8:30 a.m. Registration

9:00 a.m. to 4:00 p.m. Program

LOCATION

Harris Event Center at the OBA
643 N.E. 41st St., Oklahoma City
405-424-5252

ACCOMMODATIONS

Residence Inn Bricktown
400 E. Reno Ave.
Oklahoma City, OK 73104
405-601-1700 Option 0
Ask for OBA rate of \$122,
Free breakfast, Self parking \$18/day.

Embassy Suites, OKC Medical Center
741 N Phillips Ave
405-239-3900
Ask for the OBA business rate of \$152,
Made to order breakfast, Self parking \$14/
day.

* Hotel rates subject to change

QUESTIONS?

Call Nancy, Debbie or Janis at the OBA for further information at 405-424-5252, or email Janis at janisr@oba.com.

If you have a disability that may impact your participation in this event, please forward a statement regarding any special needs to the OBA. We will contact you to discuss accommodations.



2025 Retail Management Workshop



**MARCH 11-12, 2025
OBA/HARRIS EVENT CENTER
OKC**



ABOUT THE PROGRAM

This two-day, interactive, workshop designed to provide a complete overview of management and leadership principles for Retail Managers serving in all roles of the retail banking line of business for the bank. Drexler Consulting follows PSI's "Tell, Show, Do" method of teaching. Participants will learn through real-world examples, case studies, group discussion, and practical application of concepts taught. (Formerly known as Branch Manager Workshop)

LEARNING OBJECTIVES

- Interact, network, and learn from the experience of other retail bankers
- Effectively communicate vision, purpose, values for your team
- Define and implement a culture of high performance
- Understand how to communicate with others more effectively
- Effectively address underperformers
- Build client loyalty and grow the bank
- Create and execute a business plan to meet team and individual goals
- Eliminate sales pressure for your team AND exceed growth and profitability goals
- Adapt to a changing and diverse workforce and customer-base
- Receive an abundance of helpful tools and practical strategies that you can take back to your bank and immediately implement with your team
- And much more!

WHO SHOULD ATTEND

All Retail Banking Managers at all levels of experience, as well as any Banker not currently in a leadership position but who aspire to future management roles. Candidates for this training include Branch Managers, Customer Service Managers, Sales and Service Managers, Retail/Branch Operations Managers, Assistant Branch Managers, Head Tellers/Universal Bankers, Human Resource Managers, as well as Senior Retail Managers who are seeking new frameworks and tools for developing their teams.

SCHEDULE

Day 1: Essentials of Leading a High Performing Team

The session lays out foundational management and leadership principles.

The agenda includes:

- The Challenge of Leadership in Today's Retail Banking Environment
- Leading with Vision, Purpose, and Values
- Developing and Executing Your Business Plan
- Building a High Performing Culture
- Effective Communication Strategies
- Performance Management Tools for the New Workforce
- Coaching for Impact, Connection, and Results

Day 2: Developing the Team and Growing the Bank

This session focuses on hiring, motivating, and developing the retail banking team. Managers learn proven ways to engage team members and challenge them to exceptional performance.

The agenda includes:

- Adapting to a Changing and Diverse Workforce and Customer-base
- Growing the Retail Bank through WOW! Service
- Defining Service Commitment
- Leading Effective Team Meetings
- Moving Bankers from Order-Takers to Relationship Builders
- Building Client Loyalty in a High-Tech Age
- Networking and Business Development Success Strategies
- Business and Development Planning: Putting Learning to Action

REGISTRATION

To qualify for the early bird fee of \$575, you must register by 2/26/25. The fee after 2/26/25 is \$600. Non-member fee is \$1200. The fee is per person; instruction, materials, lunch, and breaks are provided.

SPEAKER

Josh Collins has been creating content and facilitating courses as part of the Drexler Consulting team since 2023. He has twelve years of banking experience serving in various leadership roles in retail banking, human resources, and talent development. Josh's background includes developing and facilitating banking, customer service, and leadership and culture development training programs. Josh is a graduate of The University of Georgia and is SHRM-CP certified. Josh enjoys equipping and encouraging bankers to grow their personal skillsets and build strong teams and cultures to maximize results for themselves and the banks they serve.