MBA Certification Programs

Advance your career and credentials.
Gain that competitive edge customers expect.

Head Teller • Branch Manager • Leadership Skills

3-part Series *4-part Series* *4-part Series*

Head Teller: 3-part Series

- Session I: Feb. 21, 2012
- Session II: Nov. 12, 2012
- Session III: Nov. 13, 2012

Branch Manager: 4-part Series

- Session I: Feb. 22, 2012
- Session II: Feb. 23, 2012
- Session III: Nov. 14, 2012
- Session IV: Nov. 15, 2012

Leadership Skills: 4-part Series

- Session I: March 26, 2012
- Session II: March 27, 2012
- Session III: Aug. 21, 2012
- Session IV: Aug. 22, 2012

Michigan Bankers Association

MBA CERTIFICATION PROGRAMS

Are you looking to promote your specialized knowledge and expertise? MBA certification programs can help you gain the respect of your peers and supervisors. Note that each series can be taken in any order.

MBA Certification Programs

- Head Teller
- Branch Manager
- Leadership Skills for Bankers

The ability to establish and maintain a clear competitive edge is a prerequisite for success in today's changing economy. You will not only enhance the knowledge and industry insight you need, but you'll also have the opportunity to demonstrate your proficiency to your colleagues and competitors. Through your participation in achieving the MBA designations, you will demonstrate an exceptional commitment to professional development.

Value of Certification

The MBA certification programs recognize bank financial management personnel who have reached an enhanced level of knowledge and proficiency.

- Validate your specialized knowledge and training.
- Enhance professional credibility with customers and management.
- Differentiate your level of expertise.
- Network with fellow certified members.
- Demonstrate exceptional commitment to professional development.

Recommended For

There is a program for every entry and mid level bank employee.

How to Achieve Your Certification

Complete the series of specialized MBA training for your program.

PROFESSIONAL HEAD TELLER CERTIFICATION

Tellers are the frontline representatives who are the "face" of your bank to anyone who walks through your institution's doors or calls your bank over the telephone. According to our customers, tellers reign as the most important member of any banking institution. Financial institution employees in the role of head teller must be professional today to stay up with the competition. Every head teller must utilize the key principles of quality supervision, quality service and efficient bank operations. This performance-boosting, nationally acclaimed certification three-part seminar covers methods, procedures, staffing and training directed at the head teller, teller line supervisors and assistant head tellers who are new in the position or very experienced. All will benefit from this information packed, up-to-date seminar.

Each part of this program is designed to stand alone, and personnel who attend all three sessions will be awarded Professional Head Teller Certification. This certificate recognizes an employee's commitment to improving their knowledge and rewards outstanding performance.

Session 1 Topics

- How to help customers who are worried and concerned.
- What to say when a customer is angry.
- Recruiting, hiring and keeping new tellers: tested ideas that work.
- How to manage problem tellers.
- Improving customer service and professionalism at your frontline.

Session 2 Topics

- How to be a great supervisor/manager.
- Identifying your major time wasters: improving time management.
- How to deal with conflicts (scheduling, personalities, etc.).
- Know your customer rules – are your tellers prepared?
- How to handle difficult customers: how to help during a financial crisis.

Session 3 Topics

- Helping vs. Selling: what's the differences and why does it matter?
- Ten tips for helping customers.
- Identifying helping opportunities.
- Professional ways to present suggestions.
- Cross selling check list: do's and don'ts and more.

Open Forum

In addition to asking questions during the seminar, participants will have three formal opportunities to ask questions and share their own ideas on the responsibilities and challenges of supervising the frontline. This will be held after the morning break, after lunch and after the afternoon break.

BRANCH MANAGER CERTIFICATION

Each workshop will help branch managers recognize the special challenges of your jobs and encourage you to develop and practice sound management techniques. These techniques train branch managers to transform your offices into winning operations. Transformation occurs when attendees learn how to identify the critical measures of branch performance and ways to influence your staff in a positive manner. Please make plans to attend or have your branch staff attend this four-part seminar, which can be taken in any order.

Each part of this program is designed to stand alone, and branch personnel who attend all four sessions will be awarded a Branch Manager Certification. This certificate recognizes an employee's commitment to improving their knowledge and rewards outstanding performance.

Session 1 Topics

- Leadership skills, motivation, customer care and helping your boss achieve goals
- The 21st century management skills for a changing industry and economy
- How to manage worried customers: Winning back trust
- Competitive Advantage: How to make you and your bank extraordinary
- How to motivate your staff during economic recessions
- Management styles: How to apply the four proven leadership models

Session 2 Topics

- Improve outside sales calls, build a better team, best organizational skills
- What do your customers want? Telephone shopping your competition
- How to build a branch team
- How to be more organized and efficient, multiply your effectiveness, improve your staff meetings
- How to make effective outside sales calls, how to close a sale
- Selling customers vs. helping: Which is better?

Session 3 Topics

- Hiring, keeping the best employees, training excellence, accountability
- Employee Dress codes: What is missing in your policy?
- How to manage the "problem employee": Responsibility and accountability tools
- How to increase sales leads and referrals by staff, how to identify opportunities to help customers
- Professional ways to present suggestions, creative ways to ask for the business
- How to manage the busy customers who resist suggestions

Session 4 Topics

- Goal setting, leading change, difficult customers, branch banking future
- How to create realistic goals and better results
- Stress: How to manage the factors for you and your branch
- Job sharing and flex time: What are other banks doing?
- The future of branch banking: More sales, less transaction, more cost cutting, more technology, improved customer relationships!

LEADERSHIP SKILLS FOR BANKERS

The next step in your professional development is the Leadership Skills for Bankers series.

In today's highly competitive and uncertain financial services environment, the need for strong bank leaders has never been greater. Leadership is more than your personal characteristics and abilities. You must understand and be able to lead in different arenas. Banks cannot be managed to greatness. They must be led by excellent managers who have developed their capabilities on four critical levels.

1. ***Self***: Exactly what is my style and how effective is it? How do I maximize my gifts and talents and what behaviors must I change for maximum effectiveness?
2. ***The Organizational Level***: High performance organizations have common characteristics and expectations of their members. Learn what these are and how your bank can reinforce or introduce a high performance culture.
3. ***The Individual Level***: Learning how to adapt to the varying communication, recognition and development needs of different personality types is one of a manager's biggest challenges.
4. ***The Team Level***: Reaching high levels of creative collaboration requires special team development processes, tools and skills.

Session One: Maximizing Your Talents as a Manager/Leader
Leadership Level 1: Self Awareness and Behavioral Style
This class will teach you to distinguish clearly between your role as manager and leader and understand the mind sets and behaviors of successful styles. Participants will complete a leadership style assessment on the Internet before class begins. Instructions will be sent via e-mail. An investment of $99 (subject to change) per participant will cover the administration of the leadership style assessment.

Session Two: Creating High Performance Organizations (HPOs)
Leadership Level 2: Organizational
Learn to distinguish between HPOs and less effective organizational cultures, assess your organization's current culture and evaluate the degree to which it supports a HPO. Understand your role as a "culture leader" and why this competency is so vital. Participants will complete an organizational culture assessment on the Internet before class begins. Instructions will be sent via e-mail. An investment of $99 (subject to change) per participant will cover the administration of the organizational culture assessment.

Session Three: Leading High Performance Teams
Leadership Level 3: Work Groups/Teams
Learn to distinguish teams from groups, get a G.R.I.P. on teams with effective goals, roles, interpersonal skills and processes/procedures, anticipate and stop common team problems before they occur.

Session Four: Getting Peak Performance from Staff Using the DiSC® Assessment
Leadership Level 4: Individuals
Understand the four DiSC® Styles of Behavior, discover your own DiSC® Style and recognize the styles of others. Participants will complete the DiSC® Assessment on the Internet before class. An investment of $99 (subject to change) per participant will cover the administration of the DiSC® Assessment.

Michigan Bankers Association

MBA Certification Programs
Lansing, MI

Name: ____________________

Title: ____________________

Bank/Firm: ____________________

Address: ____________________

City/State/Zip: ____________________

E-mail Address: ____________________

Phone: ____________________

REGISTER:

- Mail: Michigan Bankers Association, 507 S. Grand Ave., Lansing, MI 48933
- Fax: (517) 487-1235
- Phone (517) 485-3600
- Online: http://bit.ly/MBAregistration
- E-mail: mbaregistrations@mibankers.com

Methods of Payment: (check one)

☐ Check payable to Michigan Bankers Association ☐ Please Invoice (Members only)

☐ MasterCard ☐ Visa ☐ AMEX

Credit Card No.: ____________________ Exp. Date: __________

Signature: ____________________ Printed Name of Cardholder: ____________________

Cancellations: The MBA refunds registration fees for cancellations received in writing more than three business days before the event. Substitutions are always welcome.

☐ Please check here if you have a food allergy or require a vegetarian meal.

Head Teller: 3-part Series

- Session I: Feb. 21, 2012
- Session II: Nov. 12, 2012
- Session III: Nov. 13, 2012

Branch Manager: 4-part Series

- Session I: Feb. 22, 2012
- Session II: Feb. 23, 2012
- Session III: Nov. 14, 2012
- Session IV: Nov. 15, 2012

Leadership Skills: 4-part Series

- Session I: March 26, 2012
- Session II: March 27, 2012
- Session III: Aug. 21, 2012
- Session IV: Aug. 22, 2012

Please note that each series can be taken in any order.

OVERNIGHT ACCOMMODATIONS:

Downtown:
Radisson
111 N. Grand Ave.
Lansing, MI 48933
517-482-0188
www.radisson.com

North:
Courtyard by Marriott
2710 Lake Lansing Road
Lansing, MI 48912
517-482-0500
www.marriott.com

Continental breakfast begins at 8:30 a.m.
Seminar: 9 a.m. – 4 p.m.
Lunch served at Noon

Contact the MBA at 517-485-3600 or mbaregistrations@mibankers.com with any questions.

MAIL

Leadership Skills for Bankers

Member Registration Fee
Includes most instructional material, refreshments and lunch.

	Early Bird	*Regular Price*
Full Program:	(By March 12) $820 ☐	(After March 12) $900 ☐
Session 1*: March 26, 2012	(By March 12) $225 ☐	(After March 12) $245 ☐
Session 2: March 27, 2012	(By Mar. 13) $225 ☐	(After Mar. 13) $245 ☐
Session 3*: Aug. 21, 2012	(By Aug. 7) $225 ☐	(After Aug. 7) $245 ☐
Session 4: Aug. 22, 2012	(By Aug. 8) $225 ☐	(After Aug. 8) $245 ☐

** Session 1 will have a mandatory $99 (subject to change) per participant cost to cover the leadership style assessment.*

** Session 3 will have a mandatory $99 (subject to change) per participant cost to cover the DiSC® assessment.*

Please note that each series can be taken in any order.

Head Teller Certification

Member Registration Fee
Includes instructional material, refreshments and lunch.

	Early Bird Registration	*Regular Price*
Full Program:	(By Feb. 7) $615 ☐	(After Feb 7.) $675 ☐
Session 1: Feb. 21, 2012	(By Feb. 7) $225 ☐	(After Feb. 7) $245 ☐
Session 2: Nov. 12, 2012	(By Oct. 29) $225 ☐	(After Oct. 29) $245 ☐
Session 3: Nov. 13, 2012	(By Oct. 30) $225 ☐	(After Oct. 30) $245 ☐

Branch Manager Certification

Member Registration Fee
Includes instructional material, refreshments and lunch.

	Early Bird Registration	*Regular Price*
Full Program:	(By Feb. 8) $820 ☐	(After Feb. 8) $900 ☐
Session 1: Feb. 22, 2012	(By Feb. 8) $225 ☐	(After Feb. 8) $245 ☐
Session 2: Feb. 23, 2012	(By Feb. 9) $225 ☐	(After Feb. 9) $245 ☐
Session 3: Nov. 14, 2012	(By Oct. 31) $225 ☐	(After Oct. 31) $245 ☐
Session 4: Nov. 15, 2012	(By Nov. 1) $225 ☐	(After Nov. 1) $245 ☐

Michigan Bankers Association
507 S. Grand Ave.
Lansing, MI 48933

SPEAKERS

Roger Morin
Morin & Associates USA

Roger Morin, nationally known banking educator, understands the challenges head tellers face. His experience comes from being a teller, a former international banker, community bank human resource director, operations manager and line supervisor. As president of Morin & Associates USA, Mr. Morin is currently a consultant and educational trainer for financial institutions and other businesses. He also teaches as a member of the senior faculty at the prestigious Keller Graduate School's MBA program where he earned the title "Outstanding Faculty Instructor."

Phillip Borzilleri
Morin & Associates USA

Phillip Borzilleri is senior vice president of Morin & Associates and is a consultant, coach and speaker with more than 25 years of experience in operations, customer service, employee relations and training.

Mr. Borzilleri's broad background includes experience with major U.S. corporations such as Control Data, Contel, GTE and BJC HealthCare. He is experienced at working with all organizational levels from the frontline to the boardroom. Borzilleri's training and mentoring has been critical to the success of many work groups and teams. He has worked closely with dozens of managers to produce measurable financial, service and quality results. He has presented for the Ohio Bankers League, Virginia Bankers Association, Massachusetts Bankers Association, Florida Bankers Association, Alabama Bankers Association, Oregon Bankers Association and Indiana Bankers Association.