



Management Planning Checklist Storefront

Target Date	Responsibility	Completed	Executive Planning (4-6 months prior to opening)
			FSI Training Consultant to meet onsite with financial institution (3 to 4 months prior to opening)
			Determine branch hours
			Determine staffing requirements (how many and positions)
			Determine type of Incentive Plan
			Determine marketing budget for branch
			Determine salary ranges
			Determine dress code for staff (logo wear, name tag, business cards)
			FSI to provide Project Manager's name

Target Date	Responsibility	Completed	Pre-Opening (2 - 4 months prior to opening)
			Send introductory letter to retail development tenants
			Visit with retail development tenants
			Coordinate opening date and plans with retail development
			Begin recruiting for staff
			Publish employment ads
			Train staff on FI's operations / products
			Order supplies and equipment
			Order grand opening giveaways (3 months prior to GO; contact Kathleen Tench at FSI for assistance)
			Determine Grand Opening Promotion
			Coordinate with retail development tenants the ability to provide information to store personnel about the financial institution ("Banking-At-Work" day); Participate in store activities, if applicable.
			Banner or sign during building phase, if sign ordinances allow. Consider the following: "Coming Soon" sign and schedule for opening.

Target Date	Responsibility	Completed	Pre-Opening (10 days - 2 months prior to opening)
			FSI Training Consultant to conduct a one day Sales and Service Training (2 weeks prior to opening)
			Press release of opening date (approval needed)

Target Date	Responsibility	Completed	Pre-Opening (Continued)
			Print and/or broadcast ads, direct mail (approval needed)
			Statement stuffers
			Direct mail
			Social Media
			Branch Manager to meet retail development tenants

Target Date	Responsibility	Completed	Soft Opening
			“NOW OPEN” signage / banners
			Retail development business development
			Informational flyers
			Greeters at front door
			Promotional items (balloons, chip clips, pens, etc.)
			Product promotion
			Begin promotion for Grand Opening

Target Date	Responsibility	Completed	10 days prior to Grand Opening
			Send out Ribbon Cutting Ceremony Invitations; ribbon may be made up of money to be donated to local charity.
			Press release for Grand Opening Celebration
			Print and/or broadcast ads for Grand Opening
			“Grand Opening” signage
			Register to win prize

Target Date	Responsibility	Completed	Grand Opening (4 weeks after Soft Opening)
			Ribbon Cutting Ceremony (board members, retail managers, local dignitaries should be invited)
			Product promotions
			Refreshments
			Promotional items
			Microphone & amplifier, if needed
			Contests / giveaways
			Extra associates from financial institution to assist
			Branch decorations
			Photographer / Video