

Quarterly Branch Insights: Session 1 -Branch Blueprint for Success



Instructions: This worksheet is designed to help you reflect on your current practices and identify areas for improvement.

For each section, jot down your current strategies and any new ideas or changes you plan to implement. Be specific and actionable in your responses.

TEAM CULTURE:

Current Practice: What is something you are currently doing to build a strong team culture? _____

Action Plan: What is something new you plan to implement to create a stronger team culture? _____

RETAIL PARTNERSHIP:

Current Practice: What is something you are currently doing to build a strong retail partnership? _____

Action Plan: What is something new you plan to do to keep growing your relationship? _____

PROMOTIONS:

Current Practice: What is something that you are doing that keeps your promotions educational and fun? _____

Action Plan: What is something new you can add to your current promotions that will make you stand out better? _____

BUSINESS DEVELOPMENT:

Current Practice: What is something you are currently doing that drives your business development program? _____

Action Plan: What is something new you can add to your business development program to be more interactive? _____