



QUARTERLY

Branch Insights

A transformative journey meticulously designed to empower individuals overseeing and working within our branches



BRANCH BLUEPRINT FOR SUCCESS

Essential strategies for team and self-preparation, engaging retail partners, and enhancing branch success. Practical tools for team development and customer interactions, ensuring your readiness to excel professionally.



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QUARTERLY BRANCH INSIGHTS

SESSION 1



Session 1 Insights

- Develop a Strong Team Culture
- Engage with Your Retail Partner Regularly
- Create Fun Promotions
- Strengthen Your Business Development Program

BUILDING ON SUCCESS: IN-STORE BEST PRACTICES UNVEILED

In this session, we'll dive into the most effective in-store branch best practices,, featuring insights and success stories from FSI's top clients.

Prepare to gain valuable knowledge and inspiration with actionable strategies that have driven significant success and elevated branch performance.

**QUARTERLY
BRANCH
INSIGHTS**

SESSION 2
JUNE 26
2:00 PM EDT



GUEST SPEAKERS

TEAM CULTURE/RETAIL RELATIONS:

Ashley Gleason, Branch Manager
P1FCU, Clarkston, WA



Aleighsa Helmsderfer, Branch Manager
Fortera Credit Union, Hopkinsville, Kentucky



PROMOTIONS:

Danelle Morales, Branch Manager
Abound Credit Union, Bardstown, Kentucky

Sara Lewis, Sales & Service Coordinator
Abound Credit Union, Bardstown, Kentucky



BUSINESS DEVELOPMENT:

Rebecca Hannah/Branch Manager
Marine Federal Credit Union, Beaufort, South Carolina



Build a Strong Team Culture



A strong team culture and engaged team members are crucial for branch success.

Develop a team where every team member's passion fuels a collective success. This makes every challenge an exciting adventure.

Build a Strong Team Culture



Unlock the true potential of your team by prioritizing qualities that matter most:

- Attitude
- Communication Skills
- Adaptability
- Cultural Fit

Remember, technical skills can be taught, but the right personality can elevate your entire organization.

Hire for Personality

Build a Strong Team Culture



Have you ever been desperate to hire team members?

Avoid the BOZO explosion by valuing quality over urgency.

Each team member's contribution is crucial to our success – let's build wisely and thrive together."



Build a Strong Team Culture



*Kevin Paul Scott
ADDO Worldwide
Atlanta, GA*

Build a Strong Team Culture



Great teams:

Believe the best in each other

Want the best for each other

Expect the best from each other

Kevin Paul Scott – ADDO Worldwide – Atlanta, GA

Build a Strong Team Culture



If you have a team member who is not engaged, it's crucial to address it promptly. Encourage them to **BOOGIE**:

Be
Outstanding
Or
Get
Involved
Elsewhere

Mary Woodard – Granite Federal Credit Union – Millcreek, UT

Build a Strong Team Culture



Ashley Gleason, Branch Manager



Build a Strong Team Culture



Invest in Ongoing Development of Your Team Members:

- How Can We Improve?
- How Can I Help You?
- What Challenges Do You Have?



Build a Strong Team Culture



Celebrate Together and Strengthen Personal Bonds with Monthly Team Activities:

- Thanksgiving Dinner
- Bowling
- Painting
- Volunteer as a Branch (Twice a Year)



Build a Strong Team Culture



What best practice shared today will you implement to enhance your team's culture?

Understanding and Engaging With Your Retail Partner



Having a solid retail partnership is like the perfect blend of coffee and cream...



The partnership creates a powerful synergy that enhances convenience and opens doors to new opportunities for growth.

Understanding and Engaging With Your Retail Partner



Aleighsa Helmsderfer – Branch Manager



Understanding and Engaging With Your Retail Partner



Ashley Gleason, Branch Manager





Understanding and Engaging With Your Retail Partner

Foster a Sense of Community and Engagement
Within The Store

- Stay informed about events in the store.
- Be aware of special guests visits.



Understanding and Engaging With Your Retail Partner



Participate in Fund Raisers Hosted by the Store

- Encourage Team Member Participation
- Invite Members to Participate





Understanding and Engaging With Your Retail Partner

Development Connections with Store Managers
and Employees

- Spend time with employees beyond work related topics
- Show genuine interest in their lives and well being
- Thank them for their membership





Understanding and Engaging With Your Retail Partner

What best practice shared today will you implement to strengthen your retail partnership?

Creating FUN Promotions



Promotions are one of the biggest opportunities that the in-store branch has to bring attention to your branch. And, it's one of the best ways to share who we are, what we have and what we do.

Creating FUN Promotions

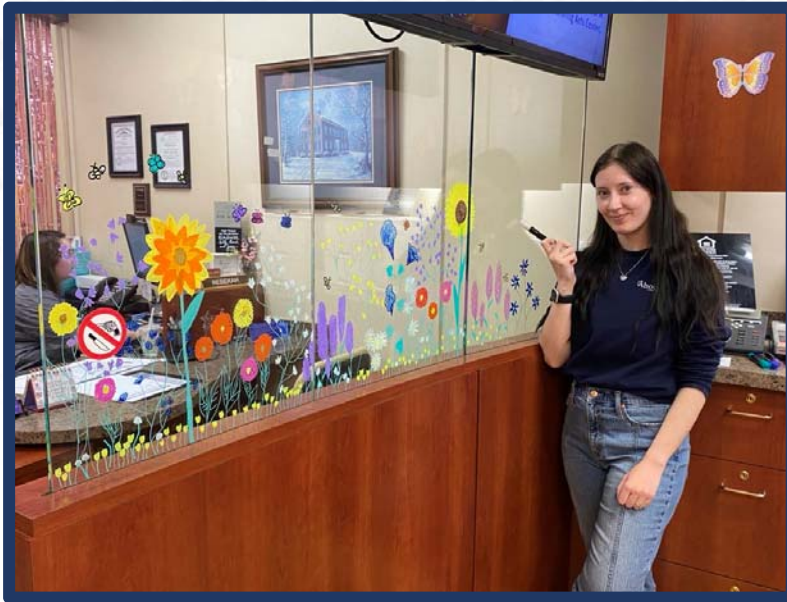


Danelle Morales, Branch Manager

Sara Lewis, Sales and Service Coordinator







Creating FUN Promotions



What best practice shared today will you implement to make your branch's promotions more engaging?

Strengthen Your Business Development Program



Business development is all about interaction and engagement. Whether it's your promotions, see-you-out-front-time or aisle walks each activity is tailored to transform shoppers into loyal members.

Strengthen Your Business Development Program



Rebecca Hannah – Branch Manager



Marine Federal CU



Coffee and donuts

- A low cost monthly promo item.
- Set up is at the branch entrance.
- It is not self serve, an employee is always there to engage and serve.
- Catches the shoppers attention and provides them a reason to engage with us.
- Provides the greeter with an opportunity for further conversation promoting MFCU while the coffee is brewing.

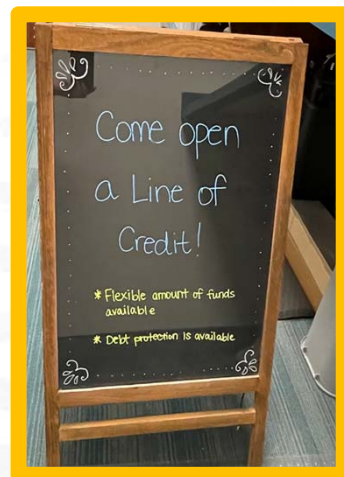
The new members that are introduced to the credit union through our coffee station have more products and services vs the members that walk in without that initial contact.

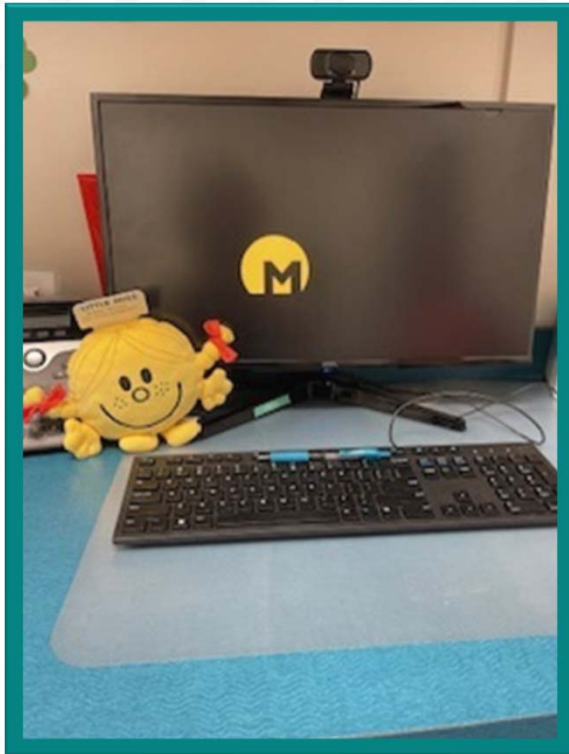
Marine Federal CU



Blackboard Buzz

- The signage promotes current products and services specials.
- Monthly giveaways or guessing jars.
- The greeter pod has pamphlets, rates, swag items and business cards readily available to share.
- The goal is that the greeter will guide the potential member to an available employee to further elaborate on the conversation or to schedule an appointment.





Game On: Fun Monthly Contests for Employees

We have monthly employee contest to promote products.

- Little Miss Winner Winner
- Challenge coin (FSI coin from conference).
- Items are a fun reminder to employees that they have a goal and members ask about them.

Strengthen Your Business Development Program



What best practice shared today will you introduce to energize your business development efforts?

MASTERING TIME: TRANSFORM YOUR PRODUCTIVITY

In today's fast-paced world, effective time management is crucial. This workshop will transform your approach to daily tasks and long-term planning, teaching you valuable strategies to prioritize effectively, streamline your workflow, and maximize each moment for heightened productivity.

Join us to learn techniques like the Brain Dump, Kick Starting Your Day, and Scheduling Your Wins, and leave with transformed habits that empower you to manage your time with confidence and precision.



SESSION 3
SEPTEMBER 25
2:00 PM EST



QUESTIONS **████████████████████**

Q & A

████████████████████ ANSWERS



Our Team



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Business Development



Use Open Ended Questions when creating rapport with shoppers customers, members. Show interest in them.

Don't be afraid to ask for the business! Simply asking for the business will increase your production by 70%.

What do you do after you ask for the business? SHHHH.... Simply be quiet.

Track the NO! No means, Not right now.

Mary K Van Gorp – Regional Manager – Community 1st Credit Union – Ottumwa, IA

Build a Strong Team Culture



ASCEND Your Team to a Higher Performance

A: Adapt and Innovate

S: Strategically Communicate

C: Create Collaboration and Cohesive Environment

E: Empower and Engage

N: Nurture Talent

D: Development Feedback

Matthew Largent – City National Bank – Lawton, OK

Paradise Valley Federal Credit Union



Business Development



Make Volunteering a Strategic Initiative: Pay for volunteer hours. Buy them food, give them SWAG.

Each employee gets 2 days of volunteer pay each year. It can be taken in 2 hour increments.

When meeting someone new, BE INTERESTED in them and their business. Do your homework.

Being interested makes YOU more interesting. They know you care.

Mary Woodard – VP Business Development – Granite Credit Union