



**QUARTERLY**

# Branch Insights

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



# QUARTERLY BRANCH INSIGHTS

## SESSION 1

### 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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# Benefits of an In-Store Branch

- Increased Foot Traffic and Exposure
- Enhanced Banking Convenience
- The Power of Positive Interactions
- The Crucial Role of the Retail Partnership

# Building a Strong Team Culture

## 1. The Power of Attitude

- Choose your vibes
- Gear up to glow
- Create winning tactics





# Building a Strong Team Culture

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## 2. Energizing Encouragement

- Write a personal note singing their praises
- Create a “Branch Trophy of the Day”
- Provide personalized treats
- Conduct Kudos meetings
- Create Wall of Fame

# Building Team Excellence



## 3. Team Huddles and Challenges

- Motivational Monday
- Thankful Thursday
- Fun Friday
- Leadership Shuffle



# Building Team Excellence

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## Daily and Weekly Challenges

- Smile Master Showdown
- Super Seller Sprint
- Idea Face Off
- Challenge-by-Choice
- Skill Building Quests

# Building Team Excellence

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## Utilize FSI's The Smart Cart

- Register each team member
- Use newsletters and podcasts for meetings
- Quarterly SuperMarketing Calendar
- Complete On-line Courses
- Utilize Documents and Forms





# Understanding and Engaging With Your Retail Partner

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## Initiate Regular Communication and Feedback

- Make Introductions
- Plan Weekly Chats
- Offer to Assist
- Work Together on Solutions



# Understanding and Engaging With Your Retail Partner

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## Be Proactive at ALL Levels

- Good Morning/Afternoon Patrols
- Attend Store Meetings
- Offer Financial Education Sessions
- Celebrate Successes Together
- Participate in Store Events

# Understanding and Engaging With Your Retail Partner

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## Engage Retail Partners

- Host Customer/Member Appreciation Days and Retail Partner Appreciation Days
- Conduct Weekly Huddles
- Provide Midnight Banking for third shift employees

# Creating FUN Promotions

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Understand the Purpose of Promotions

A Successful Promotion is:

- More than Cute Decorations
- Vibrant Decorations Using Current Themes
- Captivating Marketing Slogans
- Actively Engage and Educate Shoppers
- Update at Least Monthly



# Get Noticed with In-Store Signs

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## Maximize the Impact of In-Store Signs

- Create Eye-Catching Signs
- Keep Messages Clear and Simple
- Conduct a Visibility Test
- Strategically Place Signs
- Keep it Fresh



# Business Development



## See-You-Out-Front-Time

- Be the face of the financial institution
- Say good-morning/good-afternoon
- Engage with shoppers passing by the branch
- SMILE, SMILE, SMILE



# Business Development



## Aisle Walks

- Be the face of your financial institution
- The four phases of an aisle walk are:
  1. Walk the store greeting shoppers
  2. Look for someone that needs assistance
  3. Look for something in common with the shopper
  4. Invitation back to branch

# Business Development



## Branch Activities

- Register to win
- Simple, fun and easy games
- Kids' coloring pages
- Spin the wheel
- Trivia questions/brainteasers
- Quirky holidays

# Business Development



## Use Swag Items Wisely

*Swag, or promotional items, are giveaways often used to engage shoppers. However, when you rely solely on giving out swag it becomes a crutch. Our approach should focus on initiating genuine interactions.*

**Swag items are not a substitution for conversations.**

# Session 1 Insights



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





## QUARTERLY BRANCH INSIGHTS

# BUILDING ON SUCCESS: IN-STORE BEST PRACTICES UNVEILED

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In this session, we'll delve into the heart of successful in-store branch operations by exploring the best practices shared by our attendees in Session 1.

As we continue to build upon the foundation laid out in our previous discussion on the Branch Blueprint for Success, we are excited to uncover the insights, strategies, and experiences that have proven effective in driving success within our in-store branches.

Get ready to gain valuable knowledge and inspiration as we highlight and analyze the practices that have made a significant impact in elevating branch performance.

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**SESSION 2**  
JUNE 26  
2:00 PM EDT



**REGISTER TODAY**

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QUESTIONS

Q & A

ANSWERS



## Our Team

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