

Attract
talent

Retain
employees

Develop
leaders



Talent
Development
Courses for your
Financial Institution

Pinnacle Financial Strategies

The Business for Better Banking

Talent Development Catalog

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SECTION 1
LEADERSHIP DEVELOPMENT

EXECUTIVE COACHING

Target Audience

Any current or future leader

Length of Course

10 Coaching sessions are conducted remotely (or onsite) for 60 minutes each. Sessions are scheduled every two to three weeks.

Group Size

One

Summary

What do the very best professional athletes, entertainers, and leaders have in common? They all have coaches, fine tuning their abilities and identifying blind spots that help them gain a competitive edge.

A coach helps you move from where you are now, to where you can be. From the sidelines. **How does a coach do that?**

- A coach shines a light on areas that may be blind spots.
- A coach points out subtle areas of improvement that could become roadblocks.
- A coach helps you succeed by asking powerful questions, listening intently, identifying obstacles (limiting beliefs), and developing a plan to achieve results.
- A coach helps build awareness, empowers decision-making, and leads to positive change.

How do you, as a leader, benefit from coaching?

- You are more productive.
- You are more confident.
- You are clearer about your goals and your values.
- You have improved relationships.
- You are more creative.
- You become more of the person you want to be.

How does your financial institution benefit from coaching?

- Coaching is the most effective way of targeting resources to precisely the right individual that will benefit most from coaching. Not every leader has the time to attend training.
- Coaching improves retention, which helps reduce the cost of retraining.
- Coaching improves morale.
- Coaching provides a long-term investment in higher performance.
- Coaching is evidence of your financial institution's commitment to developing its people.

Objectives

Participants are encouraged to define their own goals:

COACHING STRATEGIES FOR NEW SUPERVISORS

Objectives

Participants will be able to:

- Define coaching
- Explain why coaching is necessary
- Describe the steps of an effective coaching session
- Support, motivate, and hold their employees accountable

Target Audience

Any new supervisor or employee who is preparing to step into a supervisory role

Length of Course

Full day

Group Size

6 to 10 per session

Summary

“Congratulations! You’ve been promoted. You’re now a manager. Good luck.”

Sound familiar? Many managers were promoted because they were high-performing employees. Yet as a manager, their duties have likely changed dramatically.

One key skill a new manager needs to learn is how to coach another employee. That can be difficult, especially if the person they are coaching is a former peer. In this course, you will learn valuable tips on how to coach another employee.

COACHING SERVICE TO SALES

Target Audience

Branch management

Length of Course

Half day

Group Size

6 to 20 per session

Summary

Before your employees attend Service to Sales, managers will attend a half-day Coaching Workshop that will teach managers how to coach and reinforce the skills learned during Service to Sales training.

Coaching is a critical component of an employee's success.

Objectives

Participants will be able to:

- Define coaching
- Explain why coaching is necessary
- Describe the steps of an effective coaching session
- Identify ways to support, motivate, and hold their employees accountable

SERVICE TO SALES

Objectives

Participants will be able to:

- Explain the difference between sales skills at a financial institution and at other businesses
- Explain the difference between sales and service
- Demonstrate the seven basic sales skills necessary for any financial institution employee
- Match the right products/services to the needs of accountholders
- Effectively handle objections using the LACE method

Target Audience

All frontline employees

Length of Course

- **Option 1:** Two-hour instructor-led workshop (after successful completion of 12 pre-training eLearning modules)
- **Option 2:** Half day instructor-led workshop

Group Size

6 to 20 per session

Summary

Have you observed your employees open a new account for an accountholder? Does this sound familiar?

- **Accountholder:** "I'd like to open a checking account."
- **Employee:** "Okay, well, we have Free Checking, Direct Checking, Super Direct Checking, Super Free Platinum Checking, and Premier Checking. You **MUST** have direct deposit. You **MUST** maintain a minimum balance requirement of \$1.5 billion to get free eStatements. And you **MUST** conduct at least 270 debit card transactions per day to get an additional .00001% interest rate, etc."
- **Accountholder:** "Um...okay. I just want a checking account."
- **Employee:** "Which one?"

Sales is about building relationships. It's about service. It's about listening and finding the best product or service based on the needs of your accountholders. If it's done right, you'll build long-lasting relationships with your accountholders and their families.

PERFECTING YOUR PRESENTATION SKILLS

Target Audience

Any employee responsible for presenting to others

Length of Course

Full day

Group Size

3 to 6 per session

Summary

Most of us find ourselves presenting to others in some form or fashion. Yet, for many people, the thought of presenting in front of others can be enough to make their palms sweat and stomachs tie in knots. In this interactive session, you will learn some quick and easy tips to improve your presentation skills so your audience will not only stay engaged, but also will walk away from your presentation informed and inspired. This course will help you gain the confidence you need to present more effectively.

Be prepared to deliver a five-to-ten minute sample of an upcoming presentation. Bring your laptop with the presentation as well as any handouts you would like to use.

Objectives

Participants will be able to:

- Describe the basics of adult learning theory
- Describe the parts of an effective presentation
- Understand the Do's and Don'ts of PowerPoint
- Demonstrate three ways to increase audience involvement
- Effectively manage difficult behaviors during a presentation
- Gain confidence in their presentation skills

TRAIN THE TRAINER

Objectives

Participants will be able to:

- Describe the basics of the adult learning theory
- Define the ADDIE process for designing and developing courses
- Demonstrate how to effectively use visual aids such as flip charts, PowerPoint, etc.
- Demonstrate three ways to increase audience involvement
- Apply the best method for analyzing learning effectiveness

Target Audience

Anyone responsible for training others

Length of Course

Two full days

Group Size

3 to 7 per session

Summary

If you are responsible for training other employees, this is the course for you. According to the Association for Talent Development (ATD), over 68% of learning professionals do not have formal training in learning and development.

In this two-day session, you will learn how to design and deliver employee training programs that are effective, engaging, and interactive. Be prepared to deliver a five- to ten-minute sample of an upcoming training course.

COMMUNICATING EFFECTIVELY

Target Audience

All employees

Length of Course

Half day

Group Size

6 to 20 per session

Summary

What is the cost of poor communication? According to a survey by David Grossman, 400 companies with 100,000 employees each cited an average loss of \$62.4 million per year because of inadequate internal communication.

In this session, you will learn how to make sure the message you intend to deliver is received clearly and effectively.

Objectives

Participants will be able to:

- Define the three parts of communication
- Explain the importance of filters in a message
- Explain how body language and tone of voice can impact a message
- Describe at least three ways to improve communication skills

TURNING CONFLICT INTO OPPORTUNITY

Target Audience

Teams and their leaders

Length of Course

Full day

Group Size

6 to 20 per session

Summary

Conflict is normal. Conflict is inevitable. Conflict is necessary. Conflict is valuable. In this session, you will learn how to effectively manage conflict so that it becomes a tool for improved communication and growth.

Objectives

Participants will be able to:

- Define conflict
- Identify the true source of conflict
- Describe three ways conflict can be valuable
- Demonstrate how to manage a conflict scenario that is common at their financial institution

MYERS-BRIGGS TYPE INDICATOR (MBTI) ASSESSMENT FOR TEAMS

Target Audience

Teams and their leaders

Length of Course

Full day

Group Size

6 to 20 per session

Summary

Being an effective member of a team starts with having a good understanding of yourself.

This highly interactive session builds upon a prior completion of the Myers-Briggs Type Indicator assessment (MBTI). You will learn about your preferences in communication, decision-making, time management, and more. You will then discover how your individual preference type impacts your team.

Objectives

Participants will be able to:

- Define “preference”
- Conduct a self-assessment of their MBTI type
- Improve communication and leadership styles based on their MBTI type

OUTSIDE BUSINESS DEVELOPMENT

Calling Officer Training Program

Objectives

Participants will be able to:

- Acquire strong relationships with business owners
- Demonstrate their financial institution's value to business owners
- Grow new business banking relationships
- Build, enhance, and expand existing banking relationships

Target Audience

Branch managers, lenders, and anyone responsible for business development

Length of Course

- Self-paced pre-workshop activities: 4 – 6 weeks
- On-site workshop: Full day

Group Size

6 to 20 per session

Summary

You know your communities, which makes your financial institution ideally suited to meet the financial needs of businesses in your local markets. In fact, you probably have the personal accounts of many local business owners and their employees.

Pinnacle's Outside Business Development program can help you dominate the lucrative small and mid-size business banking market in your area.

This program consists of a blended approach, including:

- Pre-workshop eLearning modules to help you understand the principles and foundation of business banking.
- Branch manager/calling officer guides to help you navigate the various discussions and research you will conduct.
- A full-day, hands-on workshop to apply the knowledge learned in the pre-workshop activities.
- Job aids, forms, and templates to help you attract and retain business banking relationships.
- Articles and other resources focused on the needs of community bankers.



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SECTION 2
EMPLOYEE DEVELOPMENT

SERVICE TO SALES

Target Audience

All frontline employees

Length of Course

- **Option 1:** Two-hour instructor-led workshop (after successful completion of 12 pre-training eLearning modules)
- **Option 2:** Half day instructor-led workshop

Group Size

6 to 20 per session

Summary

Have you observed your employees open a new account for an accountholder? Does this sound familiar?

- **Accountholder:** "I'd like to open a checking account."
- **Employee:** "Okay, well, we have Free Checking, Direct Checking, Super Direct Checking, Super Free Platinum Checking, and Premier Checking. You MUST have direct deposit. You MUST maintain a minimum balance requirement of \$1.5 billion to get free eStatements. And you MUST conduct at least 270 debit card transactions per day to get an additional .00001% interest rate, etc."
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COMMUNICATING EFFECTIVELY

Target Audience

All employees

Length of Course

Half day

Group Size

6 to 20 per session

Summary

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TURNING CONFLICT INTO OPPORTUNITY

Target Audience

Teams and their leaders

Length of Course

Full day

Group Size

6 to 20 per session

Summary

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MYERS-BRIGGS TYPE INDICATOR (MBTI) ASSESSMENT FOR TEAMS

Target Audience

Teams and their leaders

Length of Course

Full day

Group Size

6 to 20 per session

Summary

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This highly interactive session builds upon a prior completion of the Myers-Briggs Type Indicator assessment (MBTI). You will learn about your preferences in communication, decision-making, time management, and more. You will then discover how your individual preference type impacts your team.

Objectives

Participants will be able to:

- Define “preference”
- Conduct a self-assessment of their MBTI type
- Improve communication and leadership styles based on their MBTI type



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SECTION 3
TRAINING/HR DEVELOPMENT

PERFECTING YOUR PRESENTATION SKILLS

Target Audience

Any employee responsible for presenting to others

Length of Course

Full day

Group Size

3 to 6 per session

Summary

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Target Audience

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Length of Course

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Group Size

3 to 7 per session

Summary

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COMMUNICATING EFFECTIVELY

Target Audience

All employees

Length of Course

Half day

Group Size

6 to 20 per session

Summary

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TURNING CONFLICT INTO OPPORTUNITY

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- Describe three ways conflict can be valuable
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COACHING STRATEGIES FOR NEW SUPERVISORS

Target Audience

Any new supervisor or employee who is preparing to step into a supervisory role

Length of Course

Full day

Group Size

6 to 10 per session

Summary

“Congratulations! You’ve been promoted. You’re now a manager. Good luck.”

Sound familiar? Many managers were promoted because they were high-performing employees. Yet as a manager, their duties have likely changed dramatically.

One key skill a new manager needs to learn is how to coach another employee. That can be difficult, especially if the person they are coaching is a former peer. In this course, you will learn valuable tips on how to coach another employee.

Objectives

Participants will be able to:

- Define coaching
- Explain why coaching is necessary
- Describe the steps of an effective coaching session
- Support, motivate, and hold their employees accountable

MYERS-BRIGGS TYPE INDICATOR (MBTI) ASSESSMENT FOR TEAMS

Target Audience

Teams and their leaders

Length of Course

Full day

Group Size

6 to 20 per session

Summary

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TRAINING & CUSTOMIZED DEVELOPMENT SERVICES

Pinnacle's team of experienced training professionals can provide additional support to your financial institution's training and development needs.

eLearning Course Development

Let Pinnacle help create or edit visually appealing and effective learning materials. Our professionals can help develop:

- eLearning courses (created with Articulate 360)
- Job aids
- Screen recordings (created with Camtasia)
- Quizzes (created with Articulate Quizmaker)

All eLearning courses are SCORM 1.2 compliant and can be designed to reside on your institution's learning management system (LMS) or on Pinnacle's Learning Resource Portal.

Our instructional design rates are competitive with industry rates and are dependent upon the scope of the project.

Instructor-led Course Development

If you are the person in charge of training and development at your financial institution, you probably wear many hats (facilitator, instructional designer, technical writer, compliance trainer, sales trainer, procedures writer, event coordinator, marketing officer, custodian, etc.).

Pinnacle can provide resources, guidance, and best practices to help you manage this very important role.

Our hourly consulting services rates are competitive with industry standards.

Our talent development professionals can help you:

- Better manage multiple training projects
- Generate support for training initiatives
- Identify when to outsource a training course
- Effectively respond to training requests from your stakeholders
- Utilize internal subject matter experts effectively
- Identify the best delivery method for a training course

IMPROVING YOUR ONBOARDING PROGRAM

Objectives

Participants will be able to:

- Describe the key components of a good onboarding program
- Improve the financial institution's onboarding program
- Share best practices of onboarding programs

Target Audience

Any hiring manager, HR and/or learning professional in charge of helping new employees during their initial onboarding process

Length of Course

Half day

Group Size

6 to 20 per session

Summary

Do you remember your first day on the job at your financial institution? How were you welcomed? What information did you receive? How long was your onboarding process?

A new employee's first day on the job can be one of the most important days in his or her career. Your financial institution's onboarding program may be a structured one- or two-day event, or it could be an informal "sit with Susie" designed to mentor new employees until they are up to speed. Either way, the importance of a successful onboarding program is obvious. You want to get employees productive as soon as possible.

In this session, you will have the opportunity to review your financial institution's onboarding program and identify ways to improve this important first step in your new employee's career.



Pinnacle
Financial Strategies

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