

Motivating & Managing the Teller Line

Motivating & Managing the Teller Line July 21 A Program for Head Tellers, Supervisors & Trainers

Want your tellers to balance, be accountable, on time and excel at sales? Sounds good doesn't it. Session one focuses on performance management - the key to teller motivation and responsibility. You will learn how to work with the teller to create a performance plan that enhances what they do well and works on what needs improvement.

Traditionally, the supervisor's role was to develop the plan for goals and objectives to be met. Employee had little input. The newest approach involves both the employee and supervisor. The employee develops the plan and sets goals and objectives. The supervisor acts as a coach, mentor and advisor. The employee must understand his/her position and responsibilities and how goals and performance interact with the organization's expectations. It is the supervisor's job to help the employee understand that his/her goals need to be consistent with organizational goals. Once the goals are clear, the supervisor needs to let the employee develop the plan. The employee must be willing to take on this role while the supervisor must learn to empower the employee and provide guidance. Highlights include:

Accountabilities Competencies

- Areas of responsibilities
- Skill sets and behavior expectations
- Change as goals are met
- Measuring accomplishments

Professional Development - Implementing Coaching Choices

- Attain new skills
- Use a proven, effective method to mentor and coach
- Enhance employee effectiveness on the job
- What to do when the plan doesn't work
- Disposition Methods and Requirements

Audience: Head tellers, teller supervisors, HR officers & trainers.

Achieving Teller Excellence July 28 A Program for Your Entire Frontline

This session is for all the tellers who want to attain and maintain EXCELLENCE! Highlights include:

- **Looking the part** - following dress code and making smart, professional choices in how you look and what you say!
- **Doing your part** - branching demands teamwork and initiative, working together, getting it done!
- **Recognizing your value** - tellers need to hear how important they are to the bank, to the customer and what a critical role they play.
- **Excelling at referrals and cross-selling** - in banking today it's about the relationship, growing it, taking care of it! Recognizing opportunities, knowing what to do and what to say will help tellers grow referrals and sell appropriately.
- **WOW those customers!** - Who's in the very best position to do just that ... a well-trained, friendly, approachable teller!
- **Know the rules, follow the rules** - adhering to procedures saves time, money and protects the teller's reputation.
- **Balancing** - knowing what to do and what not to do is how high performing tellers consistently balance.
- **Loss prevention** - well-informed tellers know what to look for to reduce the risk including fraudulent lotto winnings, counterfeits, scam artists, fake IDs and more.
- **Keep auditors and regulators happy** - pay attention and show respect when it comes to compliance.
- **High alert for bank robbery** - all tellers need to be reminded of the steps to take in the event of a robber.

Audience: Head tellers, teller supervisors, HR officers & trainers.

Presenter

Honey Shelton Reed, InterAction Training

Continuing Education

Applied: 2.5 hrs/session CBT/CPB/CCSR with the ICB

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