|  |  |
| --- | --- |
|  | SuperCommunity Banks Business Banking Agenda |
|  | Sheraton Desert Oasis, Scottsdale, AZNovember 30 – December 1, 2023(Casual attire; jeans welcome) |

# [Wednesday, November 29th]

|  |  |
| --- | --- |
| [5:45 PM]  | Meet Anat in the lobby. Anat’s mobile: (916) 717-1710. |
| [6:15 PM] | Optional dinner offsite\*. |

# [Thursday, November 30th]

|  |  |
| --- | --- |
| [7:30 AM] | Breakfast |
| [8:00 AM] | Roundtable Discussion• Bring 2-3 good ideas to share with the group• Discuss an example of what not to do (disasters)•. Bring questions you’d like to ask• Your views on the economy |
| [10:00 AM] | Break |
| [10:15 AM] | New client acquisition strategies. |
| [11:00 AM] | Automation for new and existing business. |
| [12:00 PM] | Lunch |
| [1:00 PM] | Profitability models used for pricing loans and deposits. |
| [2:00 PM] | Onboarding loans and deposits.  |
| [2:45 PM] | Lead generation; helping sales fill the funnel; data analytics. |
| [3:30 PM] | Adjourn |
| [5:45 PM] | Meet in the lobby. |
| [6:00 PM] | Dinner offsite\*. |

# [Friday, December 1st]

|  |  |
| --- | --- |
| [7:30 AM] | Breakfast: Topics for our next meeting |
| [8:00 AM] | Reward and recognition programs. |
| [9:00 AM] | Marketing for business banking – what works. |
| [10:00 AM] | Break |
| [10:15 AM] | Portfolio management, selling into the portfolio, retention and growth expectations. |
| [12:00 PM] | Adjourn |

\*Guests are welcome.

ADDITIONAL TOPICS TO CONSIDER

What credit policy changes have been made within the peer banks in response to economic challenges?

o   What new sensitivities by industry?

o   Are there any credit expansion initiatives? What are they?

·       Default rate trends

·       Retention of talent

o   What are peer banks doing that is effective in retaining lenders?

·       Sales Management-  I’m looking to keep things fresh and mix things up in sales management

o   What aspects of sales meetings are most effective?  Why?

o   Worst sales management ideas tried and why

·       Online application activity -  we’ve talked about this but interested if the tides are changing

o   What % of loan applicants are self-sourced?

o   What is the bank doing that impacts that result?

o   What does work?