

## Retail Banking Leadership Series

In association with Performance Solutions, Inc., Drexler Consulting, LLC is excited to again present one of our legacy programs, ***Retail Banking Leadership Series***, updated for 2026.

***Retail Banking Leadership Series*** is a four-part, interactive, learning series designed to provide a complete overview of management and leadership principles for Retail Banking Managers serving in all roles of retail banking.

**Who Should Attend:** All Retail Banking Managers at all levels of experience, as well as any banker not currently in a leadership position but who aspires to future management roles. Candidates for this training include Branch Managers, Customer Service Managers, Sales and Service Managers, Retail/Branch Operations Managers, Assistant Branch Managers, Head Tellers/Universal Bankers, Human Resource Managers, as well as Senior Retail Managers who are seeking new frameworks and tools for developing their teams.

### Benefits of the Series:

- Interact, network, and learn from the experience of other retail bankers
- Create and execute an effective retail business plan
- Implement a plan for your continued growth and development that is aligned with your manager's and bank's goals
- Effectively communicate vision, purpose, strategies, and consequences for your team
- Define and implement a culture of success
- Understand how to relate to others more effectively
- Build quality relationships and get important tasks done
- Effectively address underperformers
- Hire, promote, and retain the best
- Build client loyalty and grow the bank
- Streamline compliance requirements and retail operations
- Better address conflict with others and manage stress
- And much more!

### Attendees are required to:

- Attend all sessions
- Actively participate in all activities and exercises
- Complete all post-session assignments

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## **Retail Banking Leadership Series**

### *Session I: Essentials of Leading a High Performing Team*

The session lays out foundational management and leadership principles that separate great leaders from ordinary managers.

The agenda includes:

- Where Am I Today? Self-Assessment of Current Skills and Talents
- The Challenge of Leadership in Today's Retail Banking Environment
- Leading with Vision, Purpose, and Values
- Building a High Performing Culture
- Effective Communication Strategies
- Performance Management Tools for the New Workforce
- Craft a Winning Business Plan
- Business and Development Planning: Putting Learning to Action

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### *Session II: Building, Engaging, and Developing the Team*

This session focuses on hiring, motivating, and developing the retail banking team. Managers learn proven ways to engage team members and challenge them to exceptional performance.

The agenda includes:

- Hiring, Promoting, and Retaining "the Best"
- Master Effective Interviewing
- Getting the Right Person in the Right Seat
- Boost Team Member Engagement
- Key Needs and Motivations of Today's Workforce
- Coaching for Impact, Connection, and Results
- Business and Development Planning: Putting Learning to Action

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### *Session III: Serving with Excellence and Growing the Bank*

The session focuses on the Retail Leader's role in building client loyalty and growing the bank.

The agenda includes:

- How Today's Customer Experience is Changing
- Foster Loyalty in a Digital World
- Leading a Culture Committed to Service and Growth
- Run Impactful Team Meetings
- Growing the Bank through "WOW!" Service
- Deepening and Expanding Client Relationships
- Successful Networking and Business Development Strategies
- Business and Development Planning: Putting Learning to Action

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### *Session IV: Raising the Bar for Sustainable Growth*

This session provides strategies for increasing the Retail Leader's operational and leadership effectiveness.

The agenda includes:

- Overcoming Obstacles in Plan Execution
- Optimize Operations, Compliance, and More
- Success and Time Management Strategies for the Overcommitted Banker
- Building Support Across the Bank
- Navigate Conflict with Confidence
- Leading Through Planned and Unplanned Change
- Navigating the Team Through Crisis
- Business and Development Planning: Putting Learning to Action

## Retail Banking Leadership Series

### Facilitators:



**Christie Drexler** is the Owner of Drexler Consulting, LLC, a financial services consulting and training business focused on developing purpose-driven, competent, servant leaders in all roles of banking. In association with Performance Solutions, Inc. and Dianne Barton, Christie has offered training and consulting services through Drexler Consulting, LLC, for the past five years.

In addition, Christie has twenty-six years of direct experience in the financial services industry, working for both community and large regional banks. Her experience has been expansive to include successfully navigating retail and commercial banking careers. She has served as Division President, Market President, Chief Credit Officer, Chief Retail Officer, and Regional Sales & Service Manager. Christie has a B.S. in Finance from Berry College and an MBA from Georgia College and State University. She is a passionate facilitator and coach who strives to live the values and leadership strategies she teaches in her training programs.



**Josh Collins** has been creating content and facilitating courses as part of the Drexler Consulting team for the past two years. He has twelve years of direct banking experience serving in various leadership roles in retail banking, human resources, and talent development. Josh's background includes developing and facilitating banking, customer service, and leadership and culture development training programs. Josh is a graduate of The University of Georgia and is SHRM-CP certified. Josh enjoys equipping and encouraging bankers to grow their personal skillsets, build strong teams, and create cultures that maximize results for themselves and the banks they serve.

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