

# The Culture of Branch Transformation

How the Transformation Process will Positively Impact your Institution

# Impressions

- Website
- Products/Services
- Marketing
- Technology\Processes
- Interactions/Experience
- Branches



# Perceptions & Reality







# Customer/Member-Centric Mindset

Going Beyond “Smiling, Shaking Hands, and Being Friendly”

- Customer/Member Experience
- Consultative; Relationship-Driven
- Deep Understanding of Needs
- Exceeding Initial Expectations

# Employee & Leadership Engagement

## Employee Engagement

### ✓ Empowered

- Embrace technology
- Envision opportunity rather than disruption
- Nurture adaptability
- Active input on workflows

## Leadership Engagement

### ✓ Champion

- Communicate the vision often
- Model desired behaviors
- Promote continuous learning
- Provide recognition

# Branch Transformation

- Welcoming environment
- Supports the vision, mission and values
- Drives the customer/member engagement and interactions
- Creates efficiencies
- Embraces 'technology transactions' and 'human interactions'

## “Human” Interaction Transformation

- Consultative discussions
- Uncovering current and future needs
- Proactive approach to financial guidance
- Process that drives consistent future engagement and interactions

# Innovation & Experimentation

- Branch layouts
- Digital solutions
- Customer/Member-experience engagement







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