## VISIONARY OICES 2025



# The Culture of Branch Transformation

How the Transformation Process will Positively Impact your Institution



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### **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'

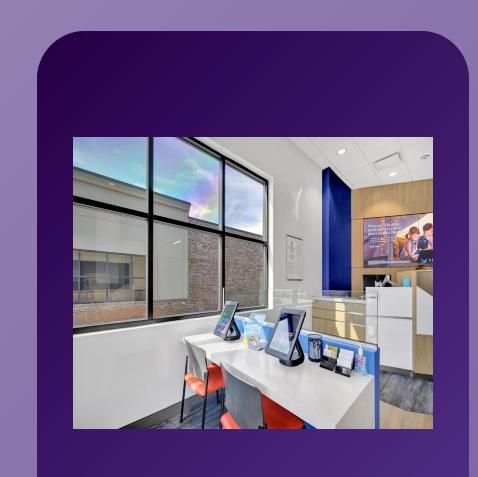
#### "Human" Interaction Transformation

- > 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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