



2020 HABERFELD

eLEARNING SOLUTIONS

2020 HABERFELD WEBINAR SERIES

Learning at Your Pace. Sessions That Make Sense. Always on Your Schedule.

JAN 15

Creating the Buzz!

Incentives are a great way to get prospective customers and members to choose us! Incentives also play a big part in creating and generating excitement among employees as well. Join us for this webinar where we will showcase different ideas Haberfeld clients have used to create Buzz!

FEB 19

Getting Everyone Involved

An engaged employee is a happy employee! Establishing an engaged team environment requires communication from the top down. This webinar will focus on strategies to better engage employees while also focusing on what employees can actively do to become more engaged with their branch teams.

MAR 18

The Importance of First Impressions

First impressions are lasting impressions. That phrase may soon sound cliché, but it's absolutely true! Prospective customers and members will decide to do business with you within the first few seconds of interacting with you. If they have a good first impression, they will not only choose you, they will stay with you!

APRIL 15

The Importance of Asking for Referrals

Referrals are not just going to happen. We have to earn them! Having good products and good service is only the first step in having a successful referral strategy. Frontline employees must consistently ask for referrals. Join this 30-minute webinar to learn more about earning referrals.

MAY 20

Plus One™ Referrals; Digital Platform

Referrals are earned! Our service levels earn them for us, but we also need tools to maximize this channel. This webinar will provide a unique combination of best practices to earn referrals and tools to harness them. We will explore Haberfeld's Plus One™ online platform; a digital referral platform our clients are using to generate referrals, track and reward employees, and track and reward referring and referred customers and members.

REGISTER AT: www.haberfeld.net/hpcwebinarreg.aspx

JUNE 17*Onboarding New
Customers and Members*

Financial institutions spend a lot of time and resources marketing to prospective customers and members, but what are we actively doing to keep them once they open their account? Join this 30-minute webinar for best practices in onboarding new customers and members.

JULY 15*How to Deal with Difficult
Customers and Members*

Banking is a service business. We strive every day to serve and make our customers and members happy, but sometimes, as hard as we try, we still fall short. Join us for this webinar to learn tactics on how to provide exceptional service to even our most difficult customers and members.

AUG 19*Business Basics*

Personal, business, or both? Many frontline employees are well versed in the personal checking account lineup, but what about business checking accounts? This webinar will focus on understanding business checking account basics.

SEPT 16*Overcoming Objections*

In this webinar we will spend our time discussing why customers and members object to products and services we offer. We will also talk about three steps to keep in mind when handling an objection: Request, Recognize, and Respond with an action plan.

OCT 21*Think "Haberfeld First!"*

The best talent is right in front of you! Haberfeld offers a variety of services to help your financial institution grow from within. Join this webinar to learn more about DiSC[®], Cultivate[™], and PXT Select[™].

NOV 18*Preparing for an Event*

Events are a great way to create excitement for prospective and current customers and members alike. It also creates excitement for branch employees! This webinar will discuss how events are most successful when marketing, timing, mail, enthusiasm, and incentives are executed together.

DEC 9*Preparing Your
Branch for 2021*

Every year is a new opportunity to get more customers and members, keep the ones we already have, and build lasting relationships with all of them! Join us for this webinar to learn tips on how to make the most out of your Haberfeld Strategy in 2021.

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Self-directed eLearning offerings

Our eLearning platform is offered to all Haberfeld clients for FREE! We offer a variety of eLearning opportunities for all frontline branch employees. Haberfeld eLearning consists of several self-directed, self-paced, online learning modules that are great for new hires and managers as well. These modules are a great training resource to help with the success of your strategy.

Checking Accounts and Your Haberfeld Strategy

These modules are great for new hires or an employee needing a refresher of the basics.

1. Introduction to Your Strategy
2. Business Checking

Exceptional Service

These modules are great for new hires and a refresher for any employee who opens checking accounts.

1. Introduction to Service Excellence
2. Creating an Exceptional Experience
3. Tell-A-Friend

Cross-Selling

These modules are great for new hires and a refresher for any employee who opens checking accounts.

1. Introduction to Cross-Selling
2. Cross-Selling using the Tell-Compel-Sell method
3. Objection Handling

Manager Specific Modules

These modules are designed for employees in a supervisory role.

1. Employee Motivation
2. Service Recovery (*Head Tellers, Assistant Managers, Managers*)

Customized eLearning Module for Your Checking Account Sales Process

Haberfeld clients find it helpful to have a customized module to cover their Checking Account Sales Process. This module is helpful for training new hires and is specific to your strategy. The customized module is roughly 30-36 minutes in length. If this is something your financial institution would like to do, please contact eLearning@haberfeld.com.

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Webinar recording offerings

Below is a list of the Haberfeld Monthly Webinar Series offerings. The offerings have been arranged by category topic. In order to access the webinar, click on the link and then enter your login and password. Login and password are the same for each webinar. Enjoy and please share and use with others in your financial institution!

Service

Service	Link to Webinar	Record Date
Improving Your Service	http://haberfeldassociates.adobeconnect.com/p39scgyc9pbm/	2018
Service Recovery	http://haberfeldassociates.adobeconnect.com/pd5bp7fuabbi/	2018
Closing the Sale Over the Phone	http://haberfeldassociates.adobeconnect.com/pst2cck7kzry/	2017
Experience Matters	http://haberfeldassociates.adobeconnect.com/p4qxo0a9fyd/	2017

Selling

Making Quotas or Making Lives Better	http://haberfeldassociates.adobeconnect.com/po0ujwzkvtYu/	2018
Selling to Different Generations	http://haberfeldassociates.adobeconnect.com/p20dztlzhre/	2016
Explain, Explore, Endorse	http://haberfeldassociates.adobeconnect.com/p5y6doqs2v6/	2016
Features and Benefits	http://haberfeldassociates.adobeconnect.com/p7tvto7zpm3/	2017

More webinar listings ►

Referral

Link to Webinar

Record Date

Tell-A-Friend Success

<http://haberfeldassociates.adobeconnect.com/p41qvfdj9r8/>

2014

Referral Marketing

<http://haberfeldassociates.adobeconnect.com/p9m0j2btomk/>

2013

Earning Referrals

<http://haberfeldassociates.adobeconnect.com/pnungyh36bd/>

2018

Business Development

**Getting Started –
Business Development**

<http://haberfeldassociates.adobeconnect.com/p9shkpv53uj0/>

2017

Business Development

<http://haberfeldassociates.adobeconnect.com/p7aqhx8bax2/>

2015

Basics

Back to Basics

<http://haberfeldassociates.adobeconnect.com/pv608l0zhci/>

2018

**Getting, Keeping, and Building
Relationships**

<http://haberfeldassociates.adobeconnect.com/p4wlrnhlasv/>

2016

More webinar listings ▶

Manager – Best Practices

	Link to Webinar	Record Date
Recruiting & Hiring for Your Strategy	http://haberfeldassociates.adobeconnect.com/p93yhsm3jg/	2015
Developing Team Players	http://haberfeldassociates.adobeconnect.com/pl51b9xse55c/	2018
Communicating Results	http://haberfeldassociates.adobeconnect.com/p8d47yp1n816/	2017
Conducting Effective Sales Meetings & Huddles	http://haberfeldassociates.adobeconnect.com/pfmbnck8uas1/	2017
What Leaders Do	http://haberfeldassociates.adobeconnect.com/pdg8snk7o1dw/	2017
Community Financial Institutions	http://haberfeldassociates.adobeconnect.com/pj16qnk2afiy/	2017
Professional Presence	http://haberfeldassociates.adobeconnect.com/p6ku83tbr24i/	2018
Managing and Adapting to Change in Your Branch	http://haberfeldassociates.adobeconnect.com/p5umqahvxog	2016
Communication and Engagement	http://haberfeldassociates.adobeconnect.com/p9jwuthxltf/	2016
Coaching and Providing Feedback	http://haberfeldassociates.adobeconnect.com/pnevvcz6yk2c/	2018
Why Choose You?	http://haberfeldassociates.adobeconnect.com/p6v56k07qtg/	2016
The Role of the Branch in the 21st Century	http://haberfeldassociates.adobeconnect.com/p1ypld4nm1ah/	2017
Be Accountable and Own It!	http://haberfeldassociates.adobeconnect.com/pu0wo8yu4c11/	2018
The Local Advantage	http://haberfeldassociates.adobeconnect.com	2019

More webinar listings ►

Events

Link to Webinar

Record Date

Holding a Successful Event

<http://haberfeldassociates.adobeconnect.com/p78m309mnuu/>

2016

Product Knowledge

eSolutions

<http://haberfeldassociates.adobeconnect.com/p7htr3k1sc0/>

2015

Direct Deposit and Automatic Payments

<http://haberfeldassociates.adobeconnect.com/p4cdlekykzg/>

2014

Savings Products

<http://haberfeldassociates.adobeconnect.com/p4ugfms0f0i/>

2014

Loan Basics

<http://haberfeldassociates.adobeconnect.com/pbuxyzmyvucy/>

2018