



DURATION

1 Day



DELIVERY CHANNEL

Facilitated
Executive Session



Session Topics

- 1 Session Introduction
- 2 Performance Drivers and Analysis
- 3 Focusing on the Customer Experience to Drive Performance
- 4 Creating Speed to Performance
- 5 Communicating the Need for Change

Facilitated Executive Session

Performance Planning Session

ALIGN YOUR RETAIL BANKING EXECUTIVES AROUND A SALES AND SERVICE VISION

SESSION OVERVIEW & BENEFITS

The Performance Planning Session is designed to build organizational alignment as your financial institution prepares to launch a retail sales training initiative in partnership with Moody's Analytics.

The session is preceded by an in-depth performance analysis, which is conducted by a Moody's Analytics facilitator with extensive retail and personal banking experience. The findings will help to identify your organization's strengths and weaknesses and improve our ability to partner with you to ensure your initiative's long-term success.

Following the performance analysis, our facilitator will conduct the one-day, results-focused Performance Planning Session. At the session, we'll discuss the findings of the performance analysis, then partner with you to define your organization's sales, service and management priorities – the specific activities for which you plan to hold employees accountable.

Next, we'll partner with you to identify potential obstacles to your initiative's success, identify ways that you might overcome them, and guide you as you craft a compelling message to communicate your initiative and goals throughout the organization.

LEARNING OBJECTIVE

Build alignment among and commitment from retail executives and managers prior to the implementation of a Moody's Analytics retail sales and service training curriculum.

COMPETENCIES GAINED

Participants will be able to:

- Form a consensus around the retail organization's key business initiatives and goals
- Build understanding of the retail organization's current and desired states
- Identify organization-specific sales, service and management priorities
- Craft a compelling message to communicate the retail organization's vision and objectives to all employees

TARGET AUDIENCE

The Performance Planning Session is suitable for anyone on the retail management team who will be involved in planning, designing and executing your organization's retail sales and service vision and training initiative.