

# FRONTLINE EXCELLENCE SPRING 2024

OBA Members: Register online at [www.oba.com](http://www.oba.com).

Please mark which session you will attend.

- April 22 -OKC / Harris Event Center at OBA
- April 23 - Tulsa/ Marriott Southern Hills
- April 24 -Enid/Autry Technology Center

1-6 Attendees \$100 each  
7+ Attendees \$90 each  
Non-Member \$225 each

*The fee is per person and includes instruction, materials, and light snacks.*

Cancellation requests must be made in writing and be received by April 18 to receive a full refund. No refunds will be given on requests received after April 18. Substitutions may be made.

BANK/CO. \_\_\_\_\_

PHONE \_\_\_\_\_

FAX \_\_\_\_\_

P.O. BOX \_\_\_\_\_ CITY \_\_\_\_\_

ZIP \_\_\_\_\_

NAME \_\_\_\_\_

TITLE \_\_\_\_\_

EMAIL \_\_\_\_\_

CELL PHONE \_\_\_\_\_

NAME \_\_\_\_\_

TITLE \_\_\_\_\_

EMAIL \_\_\_\_\_

CELL PHONE \_\_\_\_\_

### PAY BY CREDIT CARD:

For security reasons, please e-mail your registration form and credit card information to:

secure e-mail: [secure@oba.com](mailto:secure@oba.com)

BILL TO  VISA  MASTERCARD  AMEX  DISCOVER

CARDHOLDER NAME \_\_\_\_\_

CARD # \_\_\_\_\_

EXPIRATION DATE \_\_\_\_\_ CVC# \_\_\_\_\_

SIGNATURE \_\_\_\_\_

### PAY BY CHECK:

Mail this form with payment to:

Oklahoma Bankers Association

P.O. Box 960173

Oklahoma City, OK 73196-0173

## SCHEDULE

Registration ..... 4:30 p.m.  
Program..... 5:00 p.m. - 7:30 p.m.

## LOCATION

April 22- Harris Event Center at OBA  
643 NE 41st Street, OKC  
405-424-5252

April 23 - Tulsa Marriott Southern Hills  
1902 E 71st St., Tulsa  
918-493-7000

April 24- Autry Technology Center  
1201 W Willow Rd, Enid  
580-242-2750

## QUESTIONS?

Call Nancy, Debbie or Janis at the OBA for further information at 405-424-5252, or e-mail Janis at [janisr@oba.com](mailto:janisr@oba.com). If you have a disability that may impact your participation in this event, please forward a statement regarding any special needs to the OBA. We will contact you to discuss accommodations.



# 2024

# Frontline Excellence

(formerly known as Essential Teller Issues)



APRIL 22 | OKC  
APRIL 23 | TULSA  
APRIL 24 | ENID



OKC



TULSA



ENID



## FRONTLINE EXCELLENCE

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Frontline Excellence (previously referred to as Essential Teller Issues), is a program that covers 5 pivotal modules for today's frontline professionals. This program serves as an important reminder about the significance of their role, serving as the CEOs of the customer experience and reinforcing the importance of their actions and reactions as a reputation builder for your brand.

As an innovative addition, we have included an extra appendix module that houses a wealth of resources aligned with each module covered.

This program is information rich. Attendees leave with a renewed dedication to achieve excellence in their roles. Each attendee will leave with a comprehensive training manual, acting as a valuable workplace reference.

Esteemed as the nation's most dynamic teller training experience, this presents a unique opportunity to elevate your entire front-line team toward an exceptional level of performance.

## WHO SHOULD ATTEND

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Tellers, front-line professionals, anyone who has customer contact and those responsible for training and managing the customer experience

## SCHEDULE

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Registration: 4:30 p.m. to 5:00 p.m.

Program: 5:00 p.m. to 7:30 p.m.

## TOPICS

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### Professional Maturity

- Gain flexibility
- Manage your image
- What you say, how you say it
- Reputation
- Manage your emotions
- Confidentiality
- Courtesy, kindness and professionalism

### Follow Procedure

- Handle cash like a pro
- See to the details
- Be aware of your surroundings
- Maintain vigilant compliance

### Scrutinize Transactions

- Verification concerns
- Check cashing guidelines
- Identification rationale
- Dissecting transactions
- Fraudulent Schemes and Scams

### Provide Extraordinary Service

- Make their day
- What the customer wants
- Effective communication
- Five habits of highly effective tellers

### Ace Cross-Selling and Referrals

- Product knowledge proficiency
- Be inquisitive, engaging and prepared
- Spot opportunities; Start conversations
- Suggest solutions as the expert

### Master the Balancing Act

- Ten things you must do
- Six things you never do
- Avoid outages and interruptions
- Eliminate transpositions

## REGISTRATION

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1-6 Attendees	\$100 each
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## SPEAKER

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### Kristi Krayneski

Kristi loves to bring the impact of 25 years of financial services and banking experience to how leaders lead their employees and companies through growth and change within the industry. As a former community bank COO, she brings unique perspectives to the InterAction Training audiences on how leaders and employees can create an environment of healthy, forward-thinking change. She loves to share your experiences within banking and how to implement practical leadership steps to help grow you and your team!