



Bank Supervisor School

LEAD INTENTIONALLY TO CREATE AN EXCEPTIONAL TEAM

BY InterAction Training



2022



Would You Buy From You?

One of the most effective ways to assess your effectiveness in handling customers is via the question: "If you were the customer, would you buy from yourself?" Please perform a self-analysis by placing an X at the appropriate indicator on the scale after each question. The key to the scale is: 5 (completely); 3 (sometimes); 1 (not at all). You are welcome to place an X anywhere along the scale.

		5	4	3	2	1
1	Is your image one of honest and straightforward sincerity?					
2	Based on your experience with customers over the past year or so, from the buyer's point of view, would you be classified as reliable?					
3	Would you say your customers obtained special benefits dealing with you they wouldn't have obtained from others?					
4	Do you think you come off as an expert in the eyes of your customers?					
5	Have you been effective helping to solve customer problems?					
6	Whenever possible, would you say you handled problems and complaints to the buyer's satisfaction?					
7	Is INTEGRITY one of the most important words in your vocabulary?					
8	Apart from your business dealings, do you think customers believe you have their personal welfare and well-being at heart?					
9	Does your selling style/approach add significantly to the VALUE your customers are seeking?					
10	Do customers look upon you as a good reliable source of product and industry information?					
11	Has doing business with you contributed positively to most of your customers' profit performance?					
12	Would most of your company's customers continue dealing with you even if a competitor approached them with a price that's a little bit lower?					



Identifying Needs

One of the most critical parts in the managing process is discovering needs. You need to become a very good listener to achieve success. The goal is to become proficient in the art of listening and asking the right questions and to be genuine as you go about this.

ARE YOU A GOOD LISTENER?

Attitudes

Always

Never

Do you like to listen to other people talk?	5	4	3	2	1
Do you encourage other people to talk?	5	4	3	2	1
Do you listen even if you do not like the person who is talking?	5	4	3	2	1
Do you listen equally well whatever the person talking is a man or woman, young or old?	5	4	3	2	1
Do you listen equally well to a friend, acquaintance or stranger?	5	4	3	2	1

Actions

Always

Never

Do you put what you have been doing out of sight and out of mind?	5	4	3	2	1
Do you look at him/her?	5	4	3	2	1
Do you ignore the distractions around you?	5	4	3	2	1
Do you smile, nod your head, and otherwise encourage him/her to talk?	5	4	3	2	1
Do you think about what he/she is saying?	5	4	3	2	1
Do you try to figure out what he/she means?	5	4	3	2	1
Do you try to figure out why he/she is saying it?	5	4	3	2	1
Do you let him/her finish what he/she is trying to say?	5	4	3	2	1
If he/she hesitates; do you encourage him/her to go on?	5	4	3	2	1
Do you restate what he/she has said and ask him/her if you got it right?	5	4	3	2	1
Do you withhold judgment about his/her idea until he/she has finished?	5	4	3	2	1
Do you listen regardless of his/her manner of speaking and choice of words?	5	4	3	2	1
Do you listen even though you anticipate what he/she is going to say?	5	4	3	2	1
Do you question him/her in order to get him/her to explain his/her idea more fully?	5	4	3	2	1
Do you ask him/her what the words mean as he/she uses them?	5	4	3	2	1

Excellent Listener: 87 and above
 Average Listener: 78 to 86
 Needs Improvement: 77 and below

TOTAL SCORE: _____

What Do You Want?

I want to be perceived at work (by customers, management and peers) as:

(Check six)

- | | |
|--|--|
| <input type="checkbox"/> A leader | <input type="checkbox"/> Independent |
| <input type="checkbox"/> Problem collector | <input type="checkbox"/> Successful |
| <input type="checkbox"/> Average | <input type="checkbox"/> Unaware |
| <input type="checkbox"/> Reluctant | <input type="checkbox"/> Responsible |
| <input type="checkbox"/> Unsure | <input type="checkbox"/> Dull |
| <input type="checkbox"/> Bright | <input type="checkbox"/> Perceptive |
| <input type="checkbox"/> Team player | <input type="checkbox"/> Problem solver |
| <input type="checkbox"/> Uncaring | <input type="checkbox"/> Unreliable |
| <input type="checkbox"/> A follower | <input type="checkbox"/> Adaptable |
| <input type="checkbox"/> Confident | <input type="checkbox"/> Sensitive |
| <input type="checkbox"/> Mediocre | <input type="checkbox"/> Dependable |
| <input type="checkbox"/> Reliable | <input type="checkbox"/> Knowledgeable |
| <input type="checkbox"/> Serious | <input type="checkbox"/> Exceptional |
| <input type="checkbox"/> Approachable | <input type="checkbox"/> Skilled |
| <input type="checkbox"/> Qualified | <input type="checkbox"/> Proficient |
| <input type="checkbox"/> Trained | <input type="checkbox"/> Amateur |
| <input type="checkbox"/> Dedicated | <input type="checkbox"/> Empathetic |
| <input type="checkbox"/> Concerned | <input type="checkbox"/> Too busy to be bothered |



Current Culture

Please circle 5 words that best describe your organization from your perspective.

Career Opportunities	High Morale	Recognizes Staff
Caring	High Turnover	Respectful
Challenging	Inconsistent	Secretive
Change-Oriented	Innovative	Shared Values
Competitive Compensation	Shares Information	Learning Organization
Empowerment	Listens	Slow Decision Making
Fair	Out of Touch	Slow to Change
Flexible	Pride	Stressful
Fun	Professional	Teamwork
Hierarchical	Progressive	Trusting

Employee Attitude Survey

	Yes	No
1. I know exactly what is expected of me on my job.		
2. I have a very clear understanding of the results I am expected to achieve.		
3. I have a definite idea of just what authority I can exercise.		
4. I'm supervised appropriately. I get direction but have leeway to do my job.		
5. I'm supervised too closely.		
6. I'm supervised too loosely.		
7. I know very definitely what my manager thinks of my work.		
8. My manager is frank and complete in telling me what he/she thinks of my performance.		
9. Within the last 6 months my manager has made suggestions regarding responsibilities on which I need to improve.		
10. My manager frequently observes me doing my work.		
11. I have had a formal interview with my supervisor on my overall performance within the last year.		
12. My manager freely communicates and reinforces the mission of our department.		
13. I like the idea of a regular interview on my overall performance.		
14. My manager goes out of his/her way to help me in doing an even better job.		
15. I get the recognition and encouragement I desire.		
16. My supervisor uses appropriate ways to motivate me.		



Recognition Survey

How do you want to be recognized in our department? Each of us prefers to be recognized in different ways (i.e., some of us like to be recognized in a public celebration; others prefer quiet, personal recognition; etc.) Please complete this survey and let me know how to recognize your above and beyond performance!

Your Name _____ Date _____

1. What preferred name would you like used in a recognition ceremony?

2. What type of celebration do you prefer?

3. What type of award would you appreciate? (You can check more than one choice)

- | | |
|---|---|
| <input type="checkbox"/> Handwritten thank-you note/card | <input type="checkbox"/> Personalized plaque |
| <input type="checkbox"/> Typed letter for your personnel file | <input type="checkbox"/> Engraved trophy or other memento |
| <input type="checkbox"/> Framed certificate of achievement | <input type="checkbox"/> Something with the company logo |

4. What recognition gifts do you like? (You can check more than one choice)

- | | |
|---|---|
| <input type="checkbox"/> Shopping gift certificate | <input type="checkbox"/> Time with senior management |
| <input type="checkbox"/> Dinner for two | <input type="checkbox"/> Tickets to the theatre, ballet, symphony |
| <input type="checkbox"/> Attend a training class or seminar | <input type="checkbox"/> Opportunity to work on a special project |
| <input type="checkbox"/> CD's or DVDs | <input type="checkbox"/> Movie passes |
| <input type="checkbox"/> Tickets to a ball game | <input type="checkbox"/> Merchandise |
| | <input type="checkbox"/> Other _____ |

5. Who would you prefer present the award to you?

- ☐ Your manager
- ☐ The person who nominated you for the award
- ☐ Senior management

6. May I publicize your accomplishment in the company newsletter?

☐ Yes ☐ No

7. If you had a day to spend as you choose, describe what you would do and where you would go:

Employee Needs Chart

Name			
Career Aspiration			
What is most important to this person			
Strengths to develop			
What forms of recognition & awards does this person most value			
Recognition ideas for...			



Factors Important in Building Employee Morale

Rank what is important to you related to your job and your work environment

(1, 2, 3... with 1 being the most important)

- ___ Interesting work
- ___ Working Conditions
- ___ Security
- ___ Appreciation of Work Done
- ___ Wages and Benefits
- ___ Opportunity for Advancement
- ___ Feeling of being in on things/communication
- ___ Personal Loyalty to Employees
- ___ Supervision/Tactful Discipline
- ___ Sympathetic Help with Personal Problems
- ___ Flexible work schedule (remote/in person blend)
- ___ _____

Setting Behavior Expectations

More examples...

Employee
Expectations...What
this could look like?

Beyond your written policies...

We Believe in showing up on time

We Believe in owning and learning from our mistakes

We Believe in being an ideal team player

We Believe in maintaining confidentiality

We Believe in acting with professional maturity with every customer and employee interaction

We Believe we should be humfident, which means confident, in a humble sort of way

CUSTOMER SERVICE STANDARDS

Enthusiastically Greet

Be Professional

Demonstrate Knowledge

Take Ownership

Show Appreciation



Professional Maturity

Source: Interaction-training.com

We've all heard the saying, "Clothes make the man." Certainly, one look at someone goes a long way in helping us determine our perception of that person. So, while appearance is a critical component of being professional, it is by far not the only consideration. Other important components of being perceived as professional are a positive attitude, body language, good work habits and communication skills.

The components necessary to be seen as professional are:



Appearance



Positive Attitude



Communication Skills



Good Work Habits

Appearance



Appearance

Have you ever noticed that when you look good, you automatically feel better about yourself? There is a direct connection between how you look to yourself and your attitude. Taking good care of yourself improves your self-image and makes you ready to face whatever comes your way. When we dress nicely and are well-groomed, we tend to sit a little straighter, think more clearly, feel more confident, and project a positive self-image.

Let's look at our appearance through the lens of the customer...

- Do we look professional?
- Do we feel confident?
- Can we be trusted to take care of their money?
- What are some advantages to looking and dressing professionally for the people we serve?
- Clothing, hair, hands, nails, face, make-up, perfume...
- Too much skin, tattoos, unkept clothing...
- Behaving or acting inappropriately

Your work clothing should be viewed as an investment. Pieces of clothing that are traditional in style remain in style for many seasons. It is not how much money you spend on clothes that matters, but how wisely you invest in your clothing that counts.

What are some advantages to looking and dressing professionally?

HAIR

Well-cut, clean hair is essential.

For men, facial hair should be shaved daily unless a mustache or beard is worn. In that case, neat and trimmed close to the face sends the professional message.

HANDS, NAILS

Clean, well-manicured and soft are the key to sending the appropriate message. Keep hand lotion at your work area. Don't forget cuticles; they should be smooth and soft. We seal deals, say welcome and goodbye with handshakes. Polish should not be chipped or missing from nails. If you get your nails manicured, consistency is the key. Keeping appointments on a regular basis will ensure your nails always look nice.



FACE, MAKEUP, PERFUME

When you dress for work, project your intelligence first, your femininity second. This means you want the focus on your face, not elsewhere.

Evenly applied, natural-looking is the goal for makeup.

If unsure how to get the right look for the office, visit any makeup counter at the mall and tell the artist you'd like your look to appear professional. He or she will know the right touch to show you.

Avoid heavy, overpowering perfumes for the office. Just a dab will do for the office. Again, any perfume counter person can help you select a fragrance that's just right for the office.

GUARANTEED TO DETRACT FROM A PROFESSIONAL IMAGE

√ **Showing**

- Too much skin
- Tattoos
- Undergarments
- Wrinkled, unclean or unkempt clothing

√ **Behaving or Acting**

- Inappropriate
- Sharing confidential information
- Arguing
- Blaming
- Shouting
- Controlling
- Demeaning or demanding
- Unconcerned
- Gossiping
- Sharing too much personal information
- Flirting

√ **Thinking**

- "I'm better than. . ."
- "They expect too much from me."
- "I'm not paid enough to put up with this."
- "I have too much to do to be taking time with these people in the office."

✓ **Saying**

Nah	Yeah
Huh?	No problem

Communication



VERBAL AND NON-VERBAL COMMUNICATION

Communication Skills

- Verbal communication – words are powerful – we need to train on this
- Non-verbal communication – can send an even stronger message

WORDS HAVE POWER

Here's a sample list of words that repel and those you can substitute:

Some words repel.	
Avoid	Try
Contract	Agreement/paperwork
Sign here	Ok the paperwork/autograph
Sell	Get involved
Cancellation	Right of rescission
Salesperson	Business consultant
Commission	Fee
Cost	Investment
Credit card	Form of payment
Problem	Challenge, situation, issue, concern
Objections	Areas of concern
Expensive	Top of the line
Cheaper	More economical
Service charge	Processing fee
Complaint	Experience
Fault	Lapse
Mistake	Oversight
Reject	Decline
Cannot	Can
Blame	Accountable
Failure	Breakdown, malfunction



Word to Use, Words to Avoid

Using language appropriately can dramatically improve the effectiveness of our communication with others. The right words and others will be more receptive to your message. Select inappropriate words and you run the risk of others being confused, defensive, or angry.

Trigger Phrases

"Our policy. . ."

"I'm sorry, we can't."

"Sorry, that's the way it is."

"No, I don't know. . ."

"But, . . ."

"You should have. . ."

"Why didn't you. . ."

"The only thing we can do. . ."

"You need to. . ."

"No problem"

Calming Phrases

"Here's what we can do."

"I can . . ."

"Thank you for . . ."

"I can find out. . ."

"And, . . ."

"I understand why you. . ."

"I can see why. . ."

"The best option, I think is. . ."

"Might I suggest that you. . ."

"It would be my pleasure"

Attitude



Positive Attitude

It's the difference between seeing the glass half full vs. half empty

*Life is **10%** what happens to me and **90%** how I react to it – Excerpt from Chuck Swindoll*

Work Habits



Good Work Habits

CONFIDENCE

Without confidence in yourself and your abilities, you will be inclined to avoid challenges and struggle with decision making.

Best practices in building confidence

- ✓ Set personal and professional goals
- ✓ Be a sponge – always willing to learn
- ✓ Seek out additional responsibilities to help others
- ✓ Take charge of a work project or volunteer
- ✓ List – What strengths do I bring to the team?

REPUTATION

A good reputation will serve you well all through life.

Best practices in managing your reputation

- ✓ Social networking sites – build or destroy?
- ✓ Trustworthiness

Nothing can tarnish a person's reputation more than being perceived as untrustworthy or dishonest.

Social media challenge: How do you want to be perceived?



Self-Evaluation Template

Self-evaluation is a skill used by those who want to elevate their personal and professional skills. It takes courage and vulnerability to be honest with yourself. The results help you create a plan to close the gap between where you are now and where you want to be.

On a scale of 1-10 with 1 being low and 10 being high, rate yourself on the following.

Name	
Question	Rating
How successful do you want to be as a _____?	
Where do you rate yourself now?	
What do you think needs to happen for you to close the gap?	
What is your greatest challenge?	
And what else?	
What resources or skills do you need to address your challenges?	
How would things be different if you solved your challenges?	
What do you wish you had from your supervisor that you don't have now?	
If you had the best day you've ever had as a _____ what would have happened?	



The Eisenhower Box

	URGENT	NOT URGENT
IMPORTANT	DO <i>Do it now.</i> Write article for today.	DECIDE <i>Schedule a time to do it.</i> Exercising. Calling family and friends. Researching articles. Long-term biz strategy.
NOT IMPORTANT	DELEGATE <i>Who can do it for you?</i> Scheduling interviews. Booking flights. Approving comments. Answering certain emails. Sharing articles.	DELETE <i>Eliminate it.</i> Watching television. Checking social media. Sorting through junk mail.

"What is important is seldom urgent and what is urgent is seldom important."
 -Dwight Eisenhower, 34th President of the United States





Attitudes



The longer I live, the more I realize the impact of attitude on life. Attitude, to me, is more important than facts. It is more important than the past, than education, than money, than what other people think or say or do. It is more important than appearance, giftedness or skill. It will make or break a company. . . a church. . . a home. . . (a classroom). The remarkable thing is we have a choice every day regarding the attitude we will embrace for that day. We cannot change our past. . . we cannot change the fact that people will act in a certain way. We cannot change the inevitable. The only thing we can do is play on the one string we have, and that is our attitude. . . I am convinced that life is 10% what happens to me and 90% how I react to it. And so it is with you. . . we are in charge of our ATTITUDES.

- Charles Swindoll



List of Values

Accountability	Environment	Job security	Security
Achievement	Efficiency	Joy	Self-discipline
Adaptability	Equality	Justice	Self-expression
Adventure	Ethics	Kindness	Self-respect
Altruism	Excellence	Knowledge	Serenity
Ambition	Fairness	Leadership	Service
Authenticity	Faith	Learning	Simplicity
Balance	Family	Legacy	Spirituality
Beauty	Financial stability	Leisure	Sportsmanship
Being the best	Forgiveness	Love	Stewardship
Belonging	Freedom	Loyalty	Success
Career	Friendship	Making a difference	Teamwork
Caring	Fun	Nature	Thrift
Collaboration	Future generations	Openness	Time
Commitment	Generosity	Optimism	Tradition
Community	Giving back	Order	Travel
Compassion	Grace	Parenting	Trust
Competence	Gratitude	Patience	Truth
Confidence	Growth	Patriotism	Understanding
Connection	Harmony	Peace	Uniqueness
Contentment	Health	Perseverance	Usefulness
Contribution	Home	Personal fulfillment	Vision
Cooperation	Honesty	Power	Vulnerability
Courage	Hope	Pride	Wealth
Creativity	Humility	Recognition	Well-being
Curiosity	Humor	Reliability	Wholeheartedness
Dignity	Inclusion	Resourcefulness	Wisdom
Diversity	Independence	Respect	Write your own:
	Initiative	Responsibility	_____
	Integrity	Risk-taking	_____
	Intuition	Safety	

Weekly Success Plan

www.interaction-training.com

My Week Ahead

My THEME for this week beginning Date _____ is: _____

The Top 3 Priorities for this week: (If nothing else got accomplished other than these I would be happy)
1.
2.
3.

My Annual/Quarterly Goals I will take action towards this week:
1.
2.
3.

Obstacles: What's getting in the way? What one situation or decision have I been avoiding or procrastinating? What action will I take to resolve it?

I am committed to finishing this week:

What I MUST remember this week:
Birthdays, anniversaries, events, things I must remember to bring etc.

Distractions or Interruptions to watch out for this week!

Self-care: What one action will I take this week just for me?

Long-term Goal or Intention: One action I will take this week towards a long-term goal, intention, or vision:

Productivity Accelerators: What will I do to accelerator my productivity? (delegate, say no, try something new)

☐ I have reviewed and balanced my planner/organizer for the week.

I have reviewed my planner, I know what I need to say "yes" and "no" to. I have time-boxed and allowed plenty of time around appointments including travel time. I have time just for me, for my health and time for people important to me. My admin tasks are covered and I feel in control.

Weekly Success Plan

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My Week in Review: ^{date} _____

As you review your week, make sure you complete the questions below in full. You can add more items you're proud of etc. but not less than the required amount. It's important that if you can't find answers to all the questions that you lower your standards until you CAN!

Achievements: What specifically have I achieved? (successes and wins)

1. _____
2. _____
3. _____

What am I proud of this week? (What do I need to give myself a pat on the back for?)

1. _____
2. _____
3. _____

What have I learned this week? (Where was I too hard on myself, what could I have done differently, other key insights)

1. _____
2. _____
3. _____

Appreciation: (What am I grateful for this week?)

1. _____
2. _____
3. _____

Who are the people I will thank this week?

What could I do differently next week? Thinking about this week's review, what one thing could I do differently next week? It may simply be how you decide to BE or choose to see the world. It could also be an action you take, a thought or quote you focus on or something else – but it will be unique to you. Write it here and see what happens:



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Daring Feedback

The Engaged Feedback Checklist

Brené Brown

I know that I'm ready to give feedback when...

- ☐ I'm ready to sit next to you rather than across from you
- ☐ I'm willing to put the problem in front of us rather than between us (or sliding it toward you).
- ☐ I'm ready to listen, ask questions, and accept that I may not fully understand the issue.
- ☐ I'm ready to acknowledge what you do well instead of picking apart your mistakes.
- ☐ I recognize your strengths and how you can use them to address your challenges.
- ☐ I can hold you accountable without shaming or blaming.
- ☐ I am open to owning my part.
- ☐ I can genuinely thank someone for their efforts rather than criticize them for their failings.
- ☐ I can talk about how resolving these challenges will lead to growth and opportunity.
- ☐ I can model the vulnerability and openness that I expect to see from you.



Action Plan:

Goal	Purpose	Actions	Begin Date	Complete Date	CL 1-5	Support Resources Needed
		1.				
		2.				
		3.				

1. Goal
2. Purpose
3. Action

<i>Strengths</i>	<i>Areas of Growth</i>

Inspiration Nook

BOOKS

- *Good to Great – Jim Collins*
- *It's your Ship – Captain Michael Abrashoff*
- *Winning with People – John Maxwell*
- *Great by Choice – Jim Collins*
- *The Five Dysfunctions of a Team – Patrick Lencioni*
- *The Motive – Patrick Lencioni*
- *The Advantage – Patrick Lencioni*
- *The Ideal Team Player – Patrick Lencioni*
- *The Truth about Employee Engagement – Patrick Lencioni*
- *Perfect Phrases for Managers and Supervisors*
- *Perfect Phrases for Performance reviews*
- *Crucial Conversations – Patterson – Grenny – McMillan – Switzler*
- *Heart-Led Leadership – Tommy Spaulding*
- *Nice Bike – Mark Scharenbroich*
- *Dare to Lead – Brenè Brown*
- *The Coaching Habit – Michael Bungay Stanier*

PODCASTS

- *At the Table – Patrick Lencioni – the Table Group*
- *No Ego – Cy Wakeman*
- *Unlocking US – Brenè Brown*
- *Safe for Work – With Liz & Rico*

WEBSITES/LINKS

Cy Wakeman – YouTube videos (Subscribe to her YouTube page)

https://www.youtube.com/channel/UC5G_iUiSFkWILIXBOmmTjgg

interaction-training.com (Store – Free Resources)

baudeville.com

tablegroup.com

inspireyourpeople.com

mindtools.com

simpletruths.com

manager-tools.com

branchingexcellence.com (monthly publication)

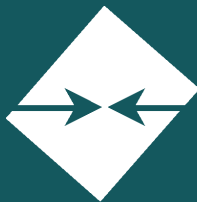




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2022