

Building Valued Relationships



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Today's Goal

Develop an understanding of the importance upon building valued relationships among your peers within the bank.

Meet the Speaker – Cody Florence

Work Experience

- **14 total years in banking:**
 - Teller
 - Customer Service Representative I/II
 - Assistant Branch Manager
 - Branch Manager I
 - Officer, Branch Manager II (2 Branches)
 - Assistant Vice President, Regional Manager
 - Vice President, Regional Manager

Education

- **Southern New Hampshire University**
 - Bachelor's Degree
 - Business Administration – Organizational Leadership
 - Class of 2021



Meet the Speaker – Cody Florence

VBA Engagements

- Emerging Bank Leaders since 2018
- Burgers with Bruce (2017, 2018, 2019)
- VBA Connect (2018)
- Financial Forecast (2019, 2022)
- Banker Day (2019)
- Back to School (2019)
- MDP Focus Group (2019)
- MDP Guest Speaker – Building Relationships (2021, 2022, 2023)

VBA - Education

- Management Development Program 2018-2019
- School of Bank Management Class of 2022





Successful Internal Networking

What does Successful Internal Networking look like?

- Increased Profitability
- Amount of Joint Business Development Calls
- Increased Qualified Referrals
- Non-Siloed Departments
- How do associates refer to clients? Are they their client or our client?



Establishing the Connection

- **Client Facing:**

- Commercial Banking
- Residential Banking
- Retail Banking
- Treasury Management
- Wealth Management

- **Client Support:**

- Client Care Center
- Digital Banking

- **Other Departments:**

- Accounting
- Compliance
- Deposit Operations
- Facilities
- Human Resources
- Loan Operations
- Security
- Technical Services



Building Trust

Once the connection is established, as a manager, we need to begin building trust with these departments.

“It is difficult to gain trust, easy to lose it, and even harder to build back”
-Patrick Heijmen, Former SVP, Director of TFB Wealth Management



Communication

- **Seek Clarity**
- **Understand the timeline in which you are dealing**
- **Keep others informed on the progress**
- **Notify others immediately when you have to adjust your course of action**



Responsiveness

Who gets irritated when the person they are working with doesn't respond back or keep you in the loop?

Respond, Respond, Respond!

- **Acknowledge receipt**
- **Set the expectation and define the deliverable**
- **Always give some type of response by close of business**
- **Keep the others in the loop – if you hit a delay, let it be known**



Associate Involvement

“The key to successful leadership is influence, not authority.”

- *Ken Blanchard*

“The first responsibility of a leader is to define reality. The last is to say thank you. In between, the leader is a servant.”

- *Max DePree*



Associate Involvement

- **Business Development Calls**
- **Visit Other Departments**
- **Spend Time in the Branches**



Career Pathing

- **Formal One-on-One Meeting Quarterly**
 - What does your associate like about their current position?
 - What is your associate passionate about?
 - Where does your associate see themselves in 5 years?
 - Where does your associate see themselves in 10 years?
 - Create an open dialogue conversation to discuss their aspirations and desires.
- **Develop a plan to help them attain their goals**



Mentoring / Mentorship

- **For those employees who are engaged and plan to stay with a company for the long run.**
- **Formal and Informal in structure**
- **A dedicated person for the associate to meet with on a consistent basis.**



Mergers and Acquisitions

- **Successful Networking**
- **Establish Connection**
- **Build Trust**
- **Communication**
- **Associate Involvement**
- **Willingness to Understand**
- **Ability to be Flexible**
- **Remain Open Minded**

QUESTIONS?



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Thank you!

