

September 13, 2022 – 9:00am to 11:45am (2 1/2 hours content)

9:00am to 10:30am

Intros & Goals – Where are We Going?

- Group Introductions and Session Objectives
- The Treasury Management Industry – How Did We Get Here? Where Are We Going?
- Treasury Management at a Crossroads

Trends & Transitions – What's Now & Next?

- Trending Payments & Solutions
- Product Direction & Transition

Group Discussion – What's trending in your markets? Who is driving change? How can you stay in the "driver's seat"?

10:30am to 10:45am - 15 Minute Break

10:45am to 11:45am

Finding Your Treasury Management Course

- Vertical Market Opportunities
- Partnerships for Success
- Setting Your Treasury Management Strategic Course

Group Discussion – What's working in your market? Have your goals changed?

Pulling it All Together

- Session Objectives – How'd We Do? Wrap Up, Questions, Comments
- Stay Informed

September 14, 2022 – 9:00am to 11:45am (2 1/2 hours content)

9:00am to 10:30am

Thoughts from Yesterday – Today's Session Objectives

Selling Treasury Management Solutions

- Deposit Trends & Treasury Management
- Relationship Acquisition, Expansion and Retention – Best Practices
- Why Do Prospective Customers Buy Bank Products?
- Guiding TM Clients to Solutions
- The Sales Solution Visit Defined
- Treasury Management Focused Selling

Group Discussion – What do you need to succeed? What keeps you up at night?

10:30am to 10:45am - 15 Minute Break

10:45am to 11:45am

Treasury Management Sales Professionals – Being Them & Coaching Them

- Treasury Management Sales Professionals
- Building a Treasury Management Sales Team
- Treasury Management Delivery Best Practices (Roles & Transitions)

Group Discussion – How do you measure success? How can you adapt your structure to meet your strategic goals?

Pulling it All Together

- Session Objectives – How'd We Do? Wrap Up, Questions, Comments
- Things We Can Learn from a Few of the Best
- The 7 Habits of Highly Effective Treasury Management People