

# HABERFELD SYMPOSIUM 2024

MAY 13-16 /// SAN ANTONIO, TEXAS

# STAKE YOUR CLAIM

Join us May 13-16 at the Hyatt Regency Hill Country where we'll talk about our industry's ever-changing landscape and what your community institution must do to claim and grow your space within it.

This one-of-a-kind gathering is all about sharing wisdom, forging relationships, and generating new ideas that will aid in your growth and success for years to come. It's also an absolute bundle of fun. Don't miss out; register for Symposium 2024 today!

## LOCATION

Hyatt Regency Hill Country

## COST

\$500 per person, which will be billed after the event.

Room rate is \$234 (plus tax) per night.

## TRANSPORTATION

Uber, Lyft and taxis are available. San Antonio International Airport (SAT) is 17 miles away from the Hyatt. Buses will be available Tuesday evening for transport to downtown San Antonio to enjoy a free night along the famed River Walk.

## QUESTIONS

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**We can't wait to laugh, learn, and connect with you!**

**Register today at [haberfeld.com/symposium](https://haberfeld.com/symposium)**

## MONDAY, MAY 13

4:00 - 6:00pm

Welcome Reception

## TUESDAY, MAY 14

7:30 - 8:30am

Breakfast

8:30 - 8:45am

Welcome

8:45 - 10:15am

The Haberfeld Report

10:15 - 10:45am

Networking and Refreshment Break

10:45am - 12:15pm

Concurrent Sessions

12:15 - 1:30pm

Lunch

1:30 - 3:00pm

Concurrent Sessions

3:00 - 3:30pm

Networking and Refreshment Break

3:30 - 5:00pm

Concurrent Sessions

## WEDNESDAY, MAY 15

7:30 - 8:30am

Breakfast

8:30 - 10:15am

Keynote Speaker, Ron "Gus" Gustafson

10:15 - 10:45am

Networking and Refreshment Break

10:45am - 12:15pm

Concurrent Sessions

12:15 - 1:30pm

Lunch

1:30 - 3:00pm

Concurrent Sessions

3:00 - 3:30pm

Networking and Refreshment Break

3:30 - 4:30pm

Closing General Session

5:30pm

Evening Event

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# Concurrent Session Descriptions

## TUESDAY & WEDNESDAY

**Branch Excellence** During Branch Excellence, you will have the opportunity to share your success stories, hear from your peers, and take back some amazing ideas to your financial institution. We will discuss strategies for a successful Big Day, maximizing referrals, business development and engagement, and how to involve the entire institution in your High Performance Growth™ (HPG™) strategy. Come with your success stories and leave with ideas that will lead to even more!  
**Recommended Attendees:** Branch managers, HPG™ champions

**Next-Level Marketing Strategies** Marketing is critical to the success of your HPG™ strategy, and it should combine time-tested principles with a variety of strategic and targeted tactics. In this session, you'll learn about Haberfeld's recent marketing tests and new developments which can help raise your marketing strategy to the next level. Whether you are a veteran marketing professional or simply want to learn more about the marketing element of your HPG™ strategy, this session is for you.  
**Recommended Attendees:** Marketing professionals, HPG™ champions

**HPG™ Checkup** Your organization's HPG™ strategy is a comprehensive program designed to energize your staff and dramatically improve profitability. The fundamental elements of consulting, training, marketing, and profitability metrics have been developed to maximize results. This session will serve as a "strategy checkup" to ensure your approach is on the right track, and that your institution is taking full advantage of both demonstrated data and retail-facing execution. Our topics will include:

- The strategic importance of HPG™ to the long-term success of your financial institution
- How each element of HPG™ plays a part in the overall success of the program
- Execution, best practices, and measuring HPG™ performance

**Recommended Attendees:** HPG™ champions, marketing professionals, branch managers

## TUESDAY ONLY

**Difficult Conversations: How to Handle Those Tough Conversations in Your Branch** Conflict is inevitable—in work and in life. Every day, we engage in many conversations ranging from the informal to the very formal. Whatever the dialog may be, things can sometimes get heated or start heading in the wrong direction. Even so, these conversations can be navigated effectively. In this session, you will learn how to address conflict and come to positive solutions in high-stakes conversations so you can be effective in your

personal and professional life. In addition, you will understand how to build your communications skills and enhance relationships within your branch, which will ultimately lead to a better team performance.  
**Recommended Attendees:** Anyone who works with clients

**Know Your Numbers** Measuring, reporting, and rewarding: These are the keys to success for top-performers. Would you like to better understand your institution's numbers and how they're impacted by both your HPG™ strategy and industry changes? This session will provide a refresher on the analysis and reporting tools at your fingertips via Haberfeld. You will also be given the chance to work with peers to develop solutions based on real-life client data. Improve your confidence, discover new ways to look at data, and walk away knowing your numbers better than ever!  
**Recommended Attendees:** Anyone at the branch manager level or above

**Building Your Professional Identity** Each of us has a professional identity. We use it to shape how our customers, members, coworkers, managers, and even our friends and family perceive us. What strategies do successful individuals utilize to improve personal performance? How do we craft our professional identity as it relates to the value we bring to others? Join us during this session as we explore strategies to grow "The Image of You."  
**Recommended Attendees:** Anyone who works with clients

**Marketing Roundtable** Calling all marketing gurus: Take this opportunity to meet and network with other talented marketing professionals to learn a great deal about what works and what doesn't. Come prepared to share your experiences and ask questions. Bring your ideas and marketing samples to share with your peers!  
**Recommended Attendees:** Marketing professionals and team members

## WEDNESDAY ONLY

**Emotional Intelligence: What All Strong Relationships Are Built On!** Do you ever wonder how some people can remain calm, cool, and collected amid challenging situations? How these same people also successfully identify and connect with their own and other people's emotions? What makes them different? It's called an Emotional Quotient (EQ), which is better known as Emotional Intelligence. High EQ helps individuals communicate better, reduce anxiety and stress, defuse conflict, improve relationships, boost empathy, and effectively overcome life's challenges. In this session, attendees will learn about the five measurements of EQ, signs of emotional

hijacking, how to avoid the four-hour recovery time, and more!  
**Recommended Attendees:** Anyone who works or lives with people!

**Developing Resiliency in the Face of Adversity** Each day, life gives us a series of challenges and rewards—obstacles to overcome, goals to achieve, relationships to nurture, accomplishments to celebrate. Properly managing these highs and lows strengthens our ability to overcome adversity, manage stress, and develop harmony between our personal and professional lives. Come learn how building mental and emotional skills strengthens our resolve, allowing us and our organizations to achieve peak performance.  
**Recommended Attendees:** Anyone who works with clients

**The Changing Face of Leadership** The role of leadership is changing. Perhaps more accurately, followership is changing. It's not that people no longer want to be led. What's changing is how and by whom they want to be led. The good news is that leaders who recognize and adapt to these changes will thrive. In this session, we'll explore the type of leadership today's workforce is seeking.  
**Recommended Attendees:** Branch managers, HPG™ champions

**Creating a Memorable Prospect-to-Client Experience** Everyone knows there is a difference between Chick-fil-A and McDonald's. On the surface, they may seem very much the same: both are fast-food restaurants providing a similar service that "prospects" are willing to pay to enjoy. But what are the key differences that set them apart? How do you quantify them? How do you replicate them? In this session, we will explore how your institution can implement a strategy that sets you apart from your competition. Is it just the transaction, or is it the full "wow" experience? Learn how to set the tone of your branch—from the personal invitation all the way to fulfilling at the highest level.  
**Recommended Attendees:** Branch managers, marketing managers, retail division managers, executives

**Understanding Your DiSC® Management Profile (Manager Academy)** Throughout Symposium, Manager Academy attendees will break into separate sessions that focus on leadership, coaching, and other pertinent topics for achieving greater success. In this session, attendees will complete a DiSC® Management profile to get more insight into their personal management style. In analyzing your results, you will gain a much better understanding of how you can more effectively lead others.  
**For Manager Academy attendees**