

# 2018 HABERFELD eLEARNING SOLUTIONS



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# 2018 HABERFELD WEBINAR SERIES

**REGISTER NOW**

**Join us every third Wednesday at 10:30am & 3:00pm CST**

Haberfeld will offer free monthly webinars again in 2018!

Each month a different topic will be discussed.

## Back to Basics

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**January 17th**

Whether your financial institution has been partners with Haberfeld for 25 years or 25 days, everyone can use a refresher on the basics that make your Haberfeld strategy a success! Please join this webinar to review and refresh on the fundamentals of on-going success.

## Coaching and Providing Feedback

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**February 21st**

Success won't just happen. A team's success is often the result of a great coach. To be a great coach or a great leader one has to communicate well and often with each member of the team. Providing effective and continuous feedback is what great leaders and coaches do. This webinar will focus on strategies to provide effective feedback.

## Be Accountable and Own it!

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**March 21st**

No excuses! A great coach and a great leader will give employees the vision and direction to be successful, but at some point it is up to each individual to own it and hold themselves accountable for personal success! In order to have a successful branch everyone needs to be accountable and participate. This webinar will discuss strategies to increase accountability in your branch.

## Earning Referrals

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**April 18th**

Referrals are earned! Our service levels earn them for us, but we also need tools to maximize this channel. This webinar will provide a unique combination of best practices to earn referrals and tools to harness them. As part of the tools, we will explore Plus One™ online platform, a digital referral platform clients are using to generate referrals and track and reward employees, customers and members.

## Loan Basics

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**May 16th**

We want to be the primary financial institution for our customers and members, which means we want them to think of us for all their lending needs as well as their deposit needs! Join this webinar to discuss some of the basic loan products including commercial loans, mortgage loans, home equity loans and home equity lines of credit in addition to other types of consumer loans.

## Developing Team Players

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**June 20th**

Employee engagement is creating a work environment where everyone is connected and everyone wants to be – employees and customers/members. The result of engagement positively influences our behaviors and level of effort in work related activities, resulting in greater achievement, employee retention and enhanced performance. This webinar will explore methods to create engaged, high performing team players.

[More webinar listings](#) ▶

# 2018 HABERFELD WEBINAR SERIES

continued

## Improving Service Strategies

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**July 18th**

Improving customer and member services is something that should always be at the forefront of your financial institution. The quality and type of service you provide your customers and members is a direct reflection of your reputation and growth in the communities that you serve. Join this webinar to learn strategies on how to continuously improve customer and member service that will help your financial institution grow.

## Service Recovery

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**August 15th**

As much as we try to avoid them, mistakes happen. How we handle those mistakes is just as important as avoiding the mistakes in the first place. Join this webinar to learn the importance of service recovery in creating lasting relationships with your customers and members.

## Making Quotas or Making Lives Better

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**September 19th**

Despite fake account scandals, cross-selling remains an important part of how we deepen relationships with customers and members. Cross-selling should be about making peoples' lives better instead of making quotas. During this webinar, we'll discuss what not to do as well as how to deepen relationships by providing product and service solutions – ultimately, gaining the trust of our customers and members.

## Professional Presence

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**October 17th**

Having a professional presence is especially important in the financial service industry. Professional presence can encompass our attitudes, our body language, what we say and how we dress. Our customers and members want to do business with professionals in a professional and personal environment. Join this webinar for tips on perfecting your professional presence.

## Leading and Managing through Change

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**November 21st**

Change is not easy, but often times to go forward change is necessary. Leading a team through a change can be a difficult yet rewarding endeavor for leaders. This webinar will focus on managing change at the branch level to better equip team members when change occurs.

## Preparing Your Branch for 2019

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**December 12th**

Every year is a new opportunity to get more customers or members, keep the ones we already have and build lasting relationships with all of them. Please join this webinar to learn tips on how to make the most out of your Haberfeld Strategy in 2019!



# 2018 HABERFELD SELF-DIRECTED eLEARNING OFFERINGS

Our eLearning platform is offered to all Haberfeld clients for FREE! We offer a variety of eLearning opportunities for all frontline branch employees! Haberfeld eLearning consists of several self-directed, self-paced, online learning modules that are great for new hires and managers as well! These modules are a great training resource to help with the success of your Haberfeld Strategy. The 2018 eLearning offerings are below. The modules are broken into categories.

## Checking Accounts and Your Haberfeld Strategy

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*These modules are great for new hires or an employee needing a refresher of the basics.*

1. Introduction to Your Haberfeld Strategy
2. Business Checking

## Cross-Selling

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*These modules are great for new hires and a refresher for any employee that opens checking accounts.*

1. Introduction to Cross-Selling
2. Cross-Selling using the Tell-Compel-Sell method
3. Objection Handling

## Exceptional Service

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*These modules are great for new hires and a refresher for any employee that opens checking accounts.*

1. Introduction to Service Excellence
2. Creating an Exceptional Experience
3. Tell-A-Friend

## Manager Specific Modules

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*These modules are designed for employees in a supervisory role*

1. Employee Motivation
2. Service Recovery (*Head Tellers, Assistant Managers, Managers*)

Please contact Rachael Houghton [rhoughton@haberfeld.com](mailto:rhoughton@haberfeld.com) for information on how your financial institution can take advantage of these self-directed eLearning offerings.

# 2018 HABERFELD WEBINAR RECORDING OFFERINGS



Below is a list of the Haberfeld Monthly Webinar Series offerings. The offerings have been arranged by category topic. In order to access the webinar, click on the link and then enter your login and password. Login and password are the same for each webinar. Enjoy and please share and use with others in your financial institution!

**Login** [Webinar@haberfeld.com](mailto:Webinar@haberfeld.com)

**Password** [password](#)

Service	Link to Webinar	Record Date
Creating a Culture of Service Excellence	<a href="http://haberfeldassociates.adobeconnect.com/p6q67fe44nd/">http://haberfeldassociates.adobeconnect.com/p6q67fe44nd/</a>	2015
Service Recovery	<a href="http://haberfeldassociates.adobeconnect.com/p7grdsvarpb/">http://haberfeldassociates.adobeconnect.com/p7grdsvarpb/</a>	2015
Handling Telephone Inquiries	<a href="http://haberfeldassociates.adobeconnect.com/pst2cck7kzry/">http://haberfeldassociates.adobeconnect.com/pst2cck7kzry/</a>	2017
Experience Matters	<a href="http://haberfeldassociates.adobeconnect.com/p4qxo0a9fyd/">http://haberfeldassociates.adobeconnect.com/p4qxo0a9fyd/</a>	2017

Selling	Link to Webinar	Record Date
Cross-Selling and Deepening the Relationship	<a href="http://haberfeldassociates.adobeconnect.com/p6toyhc533z/">http://haberfeldassociates.adobeconnect.com/p6toyhc533z/</a>	2012
Selling to Different Generations	<a href="http://haberfeldassociates.adobeconnect.com/p20dztlzhre/">http://haberfeldassociates.adobeconnect.com/p20dztlzhre/</a>	2016
Explain, Explore, Endorse	<a href="http://haberfeldassociates.adobeconnect.com/p5y6doqs2v6/">http://haberfeldassociates.adobeconnect.com/p5y6doqs2v6/</a>	2016
Features and Benefits	<a href="http://haberfeldassociates.adobeconnect.com/p7tvto7zpm3/">http://haberfeldassociates.adobeconnect.com/p7tvto7zpm3/</a>	2017

[More webinar listings](#) ▶

Referrals	Link to Webinar	Record Date
Tell-A-Friend Success	<a href="http://haberfeldassociates.adobeconnect.com/p41qvfdj9r8/">http://haberfeldassociates.adobeconnect.com/p41qvfdj9r8/</a>	2014
Referral Marketing	<a href="http://haberfeldassociates.adobeconnect.com/p9m0j2btomk/">http://haberfeldassociates.adobeconnect.com/p9m0j2btomk/</a>	2013
TAF and TAF 2.0	<a href="http://haberfeldassociates.adobeconnect.com/p22iq9dj2yf/">http://haberfeldassociates.adobeconnect.com/p22iq9dj2yf/</a>	2017

Business Development	Link to Webinar	Record Date
Getting Started – Business Development	<a href="http://haberfeldassociates.adobeconnect.com/p9shkpv53uj0/">http://haberfeldassociates.adobeconnect.com/p9shkpv53uj0/</a>	2017
Business Types	<a href="http://haberfeldassociates.adobeconnect.com/p7o6ww131hq/">http://haberfeldassociates.adobeconnect.com/p7o6ww131hq/</a>	2014
Business Development	<a href="http://haberfeldassociates.adobeconnect.com/p7aqhx8bax2/">http://haberfeldassociates.adobeconnect.com/p7aqhx8bax2/</a>	2015

On-Boarding	Link to Webinar	Record Date
On-Boarding New Customers and Members	<a href="http://haberfeldassociates.adobeconnect.com/p9itowl4u27/">http://haberfeldassociates.adobeconnect.com/p9itowl4u27/</a>	2013
On-Boarding New Hires	<a href="http://haberfeldassociates.adobeconnect.com/p75e53v60ei/">http://haberfeldassociates.adobeconnect.com/p75e53v60ei/</a>	2013
Back to Basics	<a href="http://haberfeldassociates.adobeconnect.com/p3p03ba33q7/">http://haberfeldassociates.adobeconnect.com/p3p03ba33q7/</a>	2016
Getting, Keeping, and Building Relationships	<a href="http://haberfeldassociates.adobeconnect.com/p4wlrnhlasv/">http://haberfeldassociates.adobeconnect.com/p4wlrnhlasv/</a>	2016

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Manager - Best Practices	Link to Webinar	Record Date
Recruiting and Hiring for your Haberfeld Strategy	<a href="http://haberfeldassociates.adobeconnect.com/p93yhms3jg/">http://haberfeldassociates.adobeconnect.com/p93yhms3jg/</a>	2015
Creating Clear Goals for your Department or Branch	<a href="http://haberfeldassociates.adobeconnect.com/p66awqows9y/">http://haberfeldassociates.adobeconnect.com/p66awqows9y/</a>	2013
Communicating Results	<a href="http://haberfeldassociates.adobeconnect.com/p8d47yp1n816/">http://haberfeldassociates.adobeconnect.com/p8d47yp1n816/</a>	2017
Motivating Your Team	<a href="http://haberfeldassociates.adobeconnect.com/p5h4uq1tj2l/">http://haberfeldassociates.adobeconnect.com/p5h4uq1tj2l/</a>	2013
Conducting Effective Sales Meetings and Huddles	<a href="http://haberfeldassociates.adobeconnect.com/pfmbnck8uas1/">http://haberfeldassociates.adobeconnect.com/pfmbnck8uas1/</a>	2017
What Leaders Do	<a href="http://haberfeldassociates.adobeconnect.com/pdg8snk7o1dw/">http://haberfeldassociates.adobeconnect.com/pdg8snk7o1dw/</a>	2017
Understanding the Different Generations in your Branch	<a href="http://haberfeldassociates.adobeconnect.com/p3432fzplbn/">http://haberfeldassociates.adobeconnect.com/p3432fzplbn/</a>	2015
Mystery Shopping	<a href="http://haberfeldassociates.adobeconnect.com/p6a788uk42h/">http://haberfeldassociates.adobeconnect.com/p6a788uk42h/</a>	2013
Effective eLearning and Training Strategies	<a href="http://haberfeldassociates.adobeconnect.com/p1f3quepss9/">http://haberfeldassociates.adobeconnect.com/p1f3quepss9/</a>	2015
Community Involvement	<a href="http://haberfeldassociates.adobeconnect.com/pj16qnk2afiy/">http://haberfeldassociates.adobeconnect.com/pj16qnk2afiy/</a>	2017
Professional Presence	<a href="http://haberfeldassociates.adobeconnect.com/p8avo3ops6u/">http://haberfeldassociates.adobeconnect.com/p8avo3ops6u/</a>	2015
Managing and Adapting to Change in Your Branch	<a href="http://haberfeldassociates.adobeconnect.com/p5umqahvxog">http://haberfeldassociates.adobeconnect.com/p5umqahvxog</a>	2016
Communication and Engagement	<a href="http://haberfeldassociates.adobeconnect.com/p9jwuthxltf/">http://haberfeldassociates.adobeconnect.com/p9jwuthxltf/</a>	2016
Coaching for Success	<a href="http://haberfeldassociates.adobeconnect.com/p8sz28xfo23/">http://haberfeldassociates.adobeconnect.com/p8sz28xfo23/</a>	2016
Why Choose You?	<a href="http://haberfeldassociates.adobeconnect.com/p6v56k07qtg/">http://haberfeldassociates.adobeconnect.com/p6v56k07qtg/</a>	2016
Training a New Hire and eLearning Options	<a href="http://haberfeldassociates.adobeconnect.com/p2ronsto34k/">http://haberfeldassociates.adobeconnect.com/p2ronsto34k/</a>	2016
The Role of the Branch in the 21st Century	<a href="http://haberfeldassociates.adobeconnect.com/p1ypld4nm1ah/">http://haberfeldassociates.adobeconnect.com/p1ypld4nm1ah/</a>	2017
Accountability in the Workplace	<a href="http://haberfeldassociates.adobeconnect.com/p5siaj6mqfw/">http://haberfeldassociates.adobeconnect.com/p5siaj6mqfw/</a>	2017

*More webinar listings* ▶

Events	Link to Webinar	Record Date
Making Your Big Day Great	<a href="http://haberfeldassociates.adobeconnect.com/p609qwm4a61/">http://haberfeldassociates.adobeconnect.com/p609qwm4a61/</a>	2011
Holding a Successful Event	<a href="http://haberfeldassociates.adobeconnect.com/p78m309mnuu/">http://haberfeldassociates.adobeconnect.com/p78m309mnuu/</a>	2016

Product Knowledge	Link to Webinar	Record Date
eSolutions	<a href="http://haberfeldassociates.adobeconnect.com/p7htr3k1sc0/">http://haberfeldassociates.adobeconnect.com/p7htr3k1sc0/</a>	2015
Direct Deposit and Automatic Payments	<a href="http://haberfeldassociates.adobeconnect.com/p4cdlekykzg/">http://haberfeldassociates.adobeconnect.com/p4cdlekykzg/</a>	2014
Savings Products	<a href="http://haberfeldassociates.adobeconnect.com/p4ugfms0f0i/">http://haberfeldassociates.adobeconnect.com/p4ugfms0f0i/</a>	2014
Loans	<a href="http://haberfeldassociates.adobeconnect.com/p92vnyap7e0/">http://haberfeldassociates.adobeconnect.com/p92vnyap7e0/</a>	2014
Business Products	<a href="http://haberfeldassociates.adobeconnect.com/p8hyst7yuni/">http://haberfeldassociates.adobeconnect.com/p8hyst7yuni/</a>	2014