

2025 Webinar Series

Register today and plan to join us for our Monthly Webinar Series.

haberfeld.com/webinar-series

Tell-A-Friend Engagement

JANUARY

Tell-A-Friend is hard, but it works! Offering a Tell-A-Friend coupon to every client, every time, can be overwhelming for the branch staff, but it is an important part of your financial institution's overall growth strategy! This webinar will share ideas to increase engagement and fun around your referral strategy.

Onboarding New Clients

FEBRUARY

Financial institutions spend a lot of time and resources marketing to prospective clients, but what are we actively doing to keep the client once they open their account? This webinar will discuss best practices for onboarding new clients.

Planning a Successful Event

MARCH

Events are a great way to create excitement for prospective and current customers and members. It also creates excitement for branch employees! This webinar will discuss how events are most successful when marketing, timing, mail, enthusiasm, and incentives are executed together.

Getting the Most Out of Symposium

APRIL

The annual Haberfeld Symposium is one of our most favorite events of the year! Haberfeld clients come together to network, collaborate, share ideas, and have fun! This webinar will help you prepare so you can get the most out of your Symposium experience! This webinar is for those who are attending the 2025 Haberfeld Symposium in Phoenix, AZ.

Making People's Lives Better

MAY

Cross-selling a variety products and services is key to building relationships with our clients. We need to ensure we are doing everything we can to make their lives easier, and what better way to do that than to offer easy, convenient, and (many times) free products and services to help them get the most out of their checking account? Join this webinar for details on the how to discuss the wonderful products and services your financial institution offers.

The Employee Experience

JUNE

Employee engagement and retention is more important than ever before. In recent years, an astounding number of people reported they don't feel engaged or valued at their place of employment. Join this webinar to discuss strategies to create an employee experience that fosters engagement and productivity.

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The Power of Positive Speech

JULY

Your words matter! The type of language we use with our clients can have a direct impact on how they perceive us as individuals and the financial institution as a whole. The words we use have the power to influence our branch culture. This webinar will discuss how the power of positive language can influence branch success.

Teachers Rock!

AUGUST

Recent studies show that 78% of customers said financial advice was what they needed from their bank but only 28% said they actually received it from their bank. It takes time, care, knowledge, good communication, and listening to provide this for people. It takes a great teacher!

Business Development – Getting Started

SEPTEMBER

Business clients are an important part to our overall growth strategy! To maximize our business account growth, we can't just wait for the business customer to come to us, we must be proactive and go to them! Join this webinar to hear strategies and success of getting, keeping and building relationships with new business clients.

Motivating Your Team

OCTOBER

Need a little team pick-me-up? Foggy vision? Not sure about rewards and recognition being effective? Answers to these questions and more will be covered in this webinar as we discuss strategies to help increase and create team motivation!

Professional Presence

NOVEMBER

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. Join this webinar for tips on perfecting your professional presence.

Preparing Your Branch for 2026

DECEMBER

Let's start 2026 off right by preparing to be successful! Every year is a new opportunity to get more clients, keep the ones we already have, and build lasting relationships with all of them. Join us for this webinar to learn tips on how to make the most out of your Haberfeld Strategy in 2026!