

# Private Bank Case Study: Professional Development ROI (Return on Investment)



## Solution

### Manager Program:

- 2 day Managing & Coaching for Growth
- 1 day Skills Workshop
- Weekly meetings to inspect process

### Private Banker Program:

- 2 Day Growing Your Business
- 1 Day Skills Workshop

## Overview

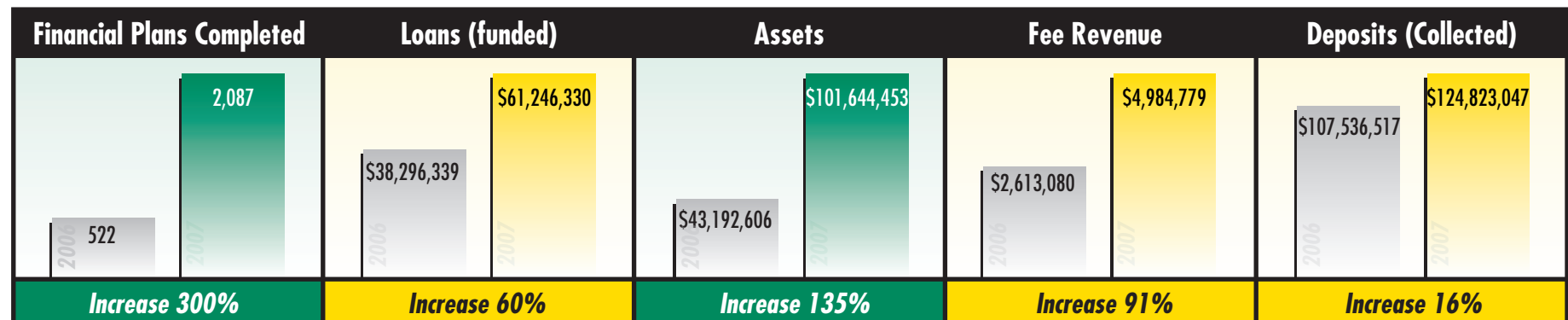
**Client:** Branch based Private Banking Group serving clients with \$250,000 - 1 million in investable assets.

**Challenge:** Increase wallet share with existing clients.

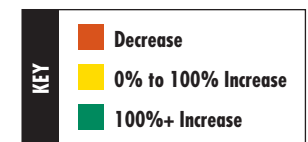
### Audience:

- 170 Private Bankers
- 37 Producing Managers

## Organizational Success



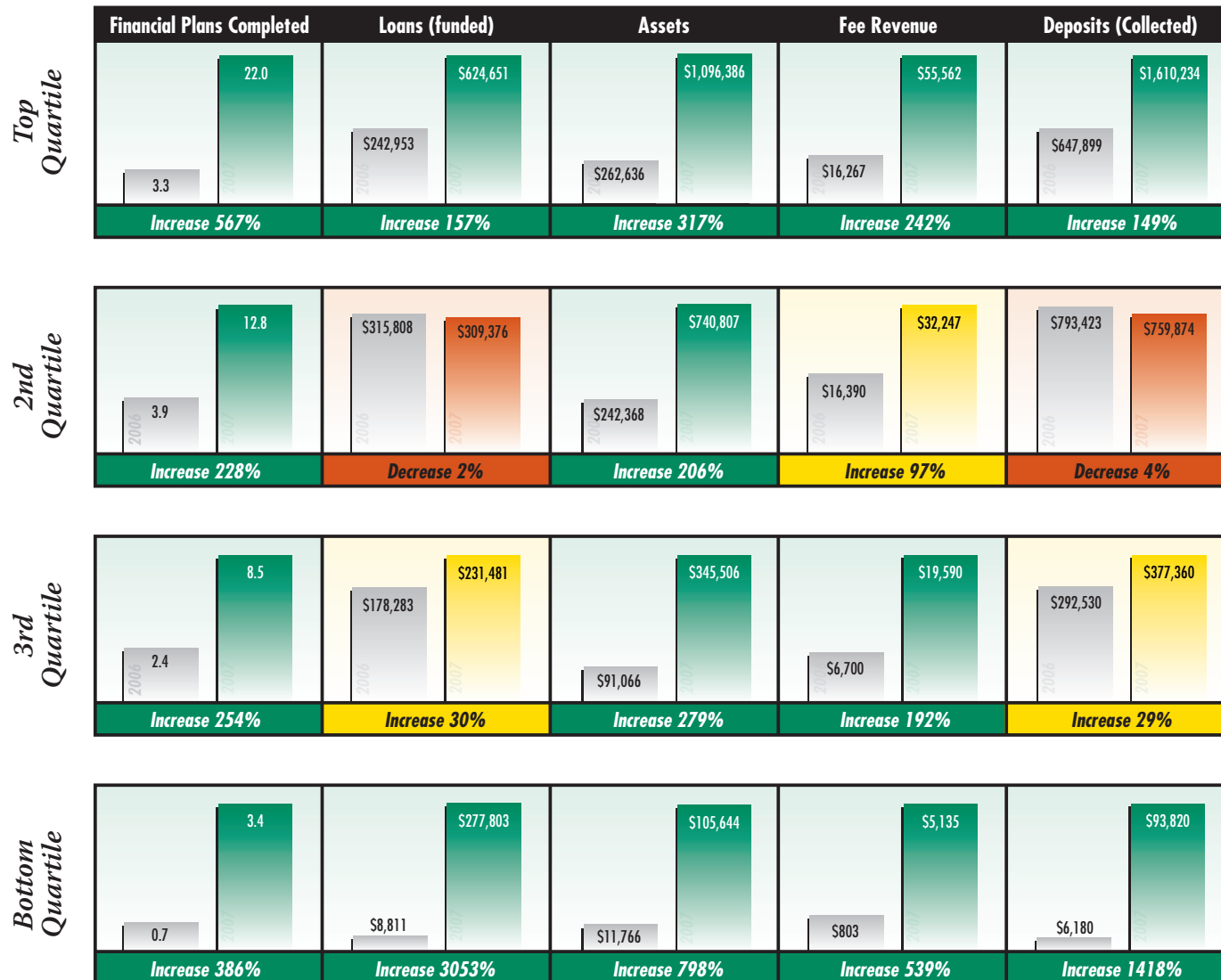
1 year time frame



# Private Bank Case Study: Professional Development ROI (Return on Investment)



## Impact at every performance Level



1 year time frame

## Outcome

As a result of this training engagement, Private Bankers dramatically improved their skills and knowledge to expand and retain current relationships and to attract new business.

By delivering a comprehensive program for both Bankers and Managers, consistent execution of key strategies and tactics was achieved. Thus, an outstanding return on investment was realized.

