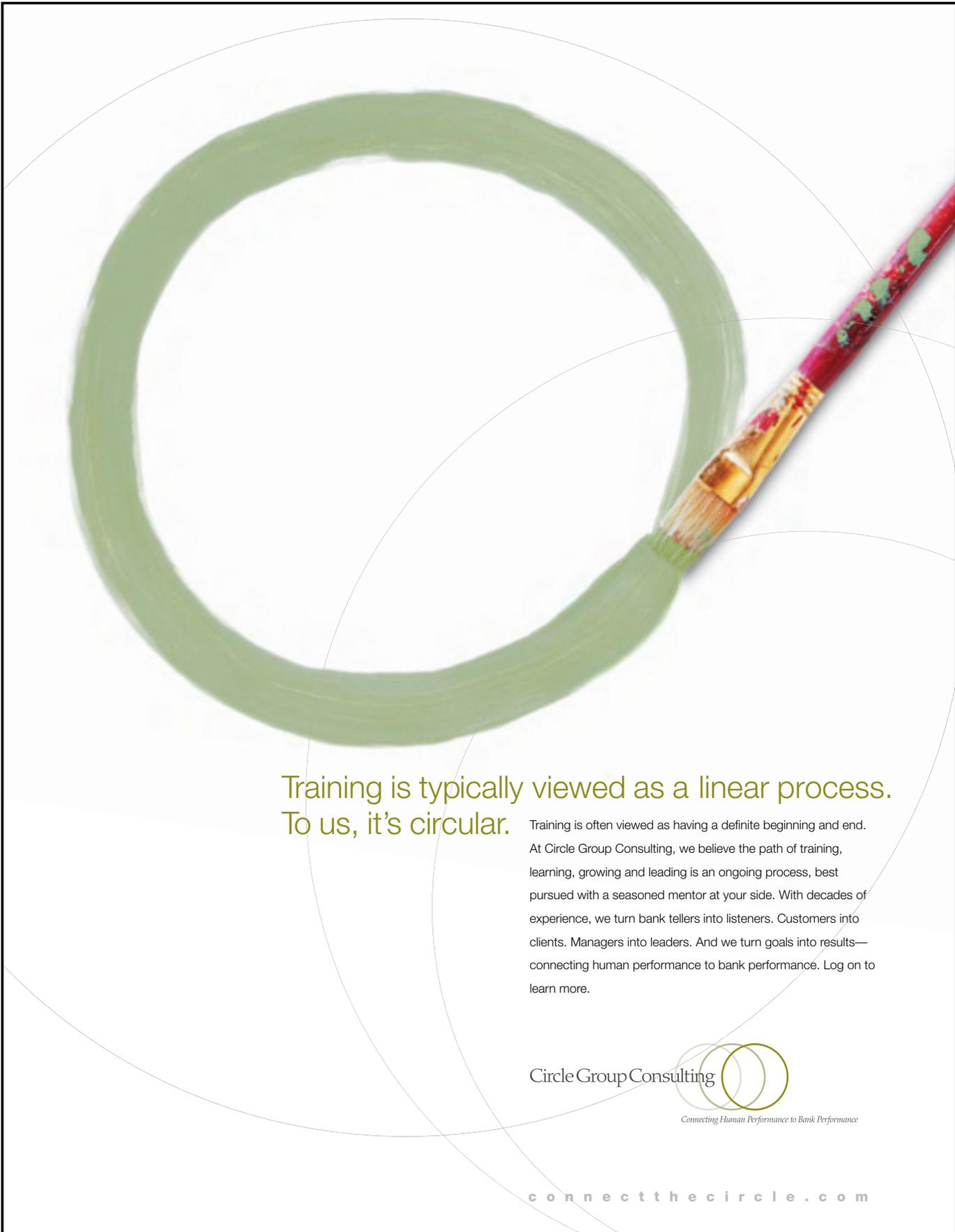


Client: Circle Group Consulting

Brand Ad



Training is typically viewed as a linear process.
To us, it's circular.

Training is often viewed as having a definite beginning and end. At Circle Group Consulting, we believe the path of training, learning, growing and leading is an ongoing process, best pursued with a seasoned mentor at your side. With decades of experience, we turn bank tellers into listeners. Customers into clients. Managers into leaders. And we turn goals into results—connecting human performance to bank performance. Log on to learn more.

Circle Group Consulting



Connecting Human Performance to Bank Performance

connectthecircle.com

Brochure (interior excerpts)



Banks today have many measures of success. You look to numbers. You look to customer satisfaction. We invite you to take an even deeper look—to the internal workings of your team.

Discover how to ignite motivation and deliver empowerment that drives your employees to achieve greater levels of personal satisfaction and performance—ultimately bringing you the numbers and the customer satisfaction you've envisioned. Do it by setting a new foundation in training that transforms your vision into results.

CIRCLE GROUP CONSULTING

E N V I S I O N (connect human performance to bank performance)

At Circle Group Consulting, we believe there's a difference between training and learning. We help people truly learn, understand and implement what they've been taught, closing the loop and delivering results.

Our difference is in our highly personalized approach. We work with individuals as well as groups to identify, pinpoint and address obstacles to performance. We evaluate prior training and its impact, and consult on what's needed today. We motivate. Mentor. Inspire. Empower. And provide a simple, actionable plan to help team members become exemplary employees and role-model leaders, achieving the measurable results you envisioned in the first place.

At Circle Group Consulting, we recognize training is a major investment. Its success will be measured by the behavioral changes that increase performance, retention and market share. With decades of firsthand experience in the financial services industry, our strategic, customized, proven approach and follow-up creates accountability, and leads to improved morale and sales results that enhance the bottom line.

We transform "good" into "great." Redefine "sales" as "service." Coach leaders. Motivate change. And connect human performance to bank performance.

CIRCLE GROUP CONSULTING

Brochure interior (continued)

THE FULL CIRCLE PROGRAM

If your destination point is stronger bank performance, consider a change in motion. Let the path of your training take the shape of a circle—an ongoing process, with a continual progression of learning and growth.

Our program evaluates prior training and its impact. Identifies obstacles to performance. Outlines what's needed today. And produces a simple, actionable plan to help individual team members achieve the measurable results you envisioned in the first place—improving leadership, enhancing sales performance and bringing your training culture full circle.

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The Full Circle Program: Complete performance consulting—from sales training to leadership coaching.

DISCOVERY
Uncover perceived and actual effectiveness of training.

ANALYSIS
Identify strengths, weaknesses and opportunities.

PROPOSAL
Present findings and propose solutions.

IMPLEMENTATION
Set the foundation for success in future training.

Our in-depth discovery process begins with qualitative data gathering through surveys and individual interviews with executive leadership and employees, identifying your bank's culture and the perceived understanding, motivation toward and effectiveness of current training programs. Training materials and employee-customer interaction are studied as well to assess actual implementation and effectiveness.

The data we gather will be reviewed and analyzed to identify the strengths and weaknesses in your training efforts, how those translate to your bank's current and past performance, and what opportunities are available to motivate and implement change for the future.

Our findings will be outlined in a discovery report and presented to you with the training solutions proposed to connect your executive-level goals with bank-wide performance. Upon reviewing the findings and agreeing to the recommendations, we'll prepare for implementation.

Personalized implementation can take many forms. Often, an initial group orientation is scheduled to outline common goals and the subsequent evolution in training. Visionaries and leaders will be identified to implement training initiatives among the staff that set the long-term foundation for growth. And due to the unique nature of this circular program, we'll be at the side of executive leadership for continued in-depth mentoring and coaching, assuring this valuable investment is attaining results and reaching its potential.

CIRCLE GROUP CONSULTING

G R O W (in-depth sessions and services we provide)

Training and Development Platforms

LEADERSHIP
Become adept at assessing areas of improvement, utilizing presentation materials and communication styles that excite motivation and change toward your goals, and adopting critical leadership attributes for long-term success.

INDIVIDUAL FOCUS
Attain a greater awareness of self—your personal values, goals and time management to your understanding of the various social and communication styles exhibited in your team—so you know how to best approach each situation to achieve the positive grid result you envision.

HIGH-PERFORMANCE CULTURE
Build a principle-based sales culture that optimally achieves business initiatives through precise matching of skill to position, thorough preparation and mentoring, and improved recruiting processes.

CONSULTATIVE CROSS SELLING
Learn to effectively apply communication techniques and sales tools to expand relationships and obtain referrals.

EXECUTION
Set a strong foundation that transforms your vision into simple, actionable steps that not only motivate, but that create change, measure progress, ensure accountability and promote ongoing growth.

MANAGING CHANGE
Understand how to combat the fears and challenges people face when confronted with change, and reaffirm the strengths, values and vision for future decision-making, accountability and success.

CIRCLE GROUP CONSULTING

L E A R N (our training and leadership consultants)

GARY BERNARD
Bernard has more than 25 years of experience in the financial services industry, serving clients as a financial advisor, fellow employees as a leader and mentor, and his own private clients as a comprehensive consultant. In addition to being an entrepreneur who cofounded Circle Group Consulting, Bernard has developed various modules on leadership and change management techniques that he uses to help fulfill the goals of individuals and businesses.

DAVE HOCKENBERRY
Hockenberry has more than 20 years of experience in the financial services industry with expertise in organizational change, strategic performance management, consulting on core competencies, and training and leadership development. As a cofounder of Circle Group Consulting, Hockenberry pairs his vast experience with a foundation of core values to lead individuals and companies to high levels of growth and success.

CIRCLE GROUP CONSULTING