###### SuperCommunity Bank Treasury Management Directors Peer Group Forum

# New York City, NY

# June 29-30, 2020

**PRELIMINARY AGENDA**

***(Casual Attire, jeans welcome)***

**Sunday, June 28th**

##### 5:45pm Meet Anat in lobby. Her cell number 916 717 1710

##### 6:00pm \*Dinner

##### Monday, June 29th

**7:30 a.m. Breakfast**

**8:00 Roundtable Discussions**

* **Bring 2-3 good ideas to share with the group**
* **Bring one best practice**
* **Discuss an example of what not to do (disasters)**
* **Bring questions you’d like to ask**
* **TM org chart (bring yours) and infrastructure growth strategy**

**9:45 Break**

**10:00 Discussion continued**

**12:00 p.m. Lunch**

**1:00 Content, format, questions etc. for 1:1 meetings with the TMOs; sales coaching**

**1:45 Checking and savings account types (bring yours)**

**2:30 Sales process, timing, best practices; stack ranking best practices**

**3:30 Adjourn**

**6:00 \*Dinner offsite**

**Tuesday, June 30th**

**7:30 a.m. Breakfast – Goals for next meeting**

**8:00 TM segmentation: small business, middle market etc.? Support? Onboarding?**

**9:00 Sales training for TMOs; career development and other training**

**10:15 Break**

**10:30 Partnering with other lines of business to optimize growth**

**11:00 Top projects for 2020/21**

**12:00 Adjourn**

**\*Spouses and guests are invited**

**Bring your handouts with enough copies for all.**

#### NEXT MEETING: THURSDAY-FRIDAY, JANUARY 21-22 , 2021