

BANK MANAGER MASTERY



GENTEX[®]

TRAINING CENTER



Introduction

The Bank Manager Mastery Training Course develops the leadership and commercial skills that branch and department managers need to run a high-performing banking unit. A bank manager balances three demands at once: business growth, operational control, and team development. This course connects daily branch leadership with the numbers that define success. It covers performance management, sales coaching, credit quality oversight, and customer experience. Furthermore, it addresses compliance culture, risk awareness, and change leadership. As a result, participants learn to lead a bank unit that grows revenue, controls risk, and keeps customers loyal.

Bank Manager Mastery Course Objectives

- Explain the core responsibilities of a bank manager across growth, risk, and people.
- Interpret branch and unit performance reports, targets, and variance analysis.
- Build a performance management cycle with clear KPIs and review cadence.
- Coach sales teams using structured observation and feedback methods.
- Apply customer segmentation and needs-based selling techniques.
- Oversee credit quality through monitoring, early warning, and escalation.
- Manage operational risk, fraud controls, and audit readiness in a bank unit.
- Build a compliance culture and embed conduct expectations in daily work.
- Handle difficult customer conversations and complaint resolution professionally.
- Lead change initiatives, team development, and succession planning.

Course Methodology

- Interactive lectures with real banking leadership case studies.
- Role-play simulations of coaching, customer, and team conversations.
- Performance review workshops using sample branch reports.

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- Case-based problem solving on credit, fraud, and service challenges.
- Structured peer discussion with facilitator feedback on leadership practice.

Who Should Take This Course

- Branch managers and assistant branch managers.
- Department and unit heads in retail and commercial banking.
- Team leaders and supervisors preparing for management roles.
- Relationship and sales team managers.
- Operations and service managers in bank branches.
- Regional managers overseeing multiple banking units.

Bank Manager Mastery Course Outlines

Day 1: The Bank Manager's Role and Performance Focus

- Responsibilities across growth, risk, people, and customer outcomes.
- Reading branch performance reports and management dashboards.
- Target setting, variance analysis, and corrective action.
- Balancing sales pressure with risk discipline.
- Communication routines: huddles, one-to-ones, and team meetings.
- Decision-making frameworks for day-to-day issues.
- Case study: a branch that turned performance around.

Day 2: Leading and Developing the Team

- Situational leadership and adapting style to team members.



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- Coaching models: observe, feedback, practise, and reinforce.
- Sales coaching on needs discovery and product matching.
- Motivation, recognition, and performance improvement plans.
- Delegation, workload balance, and time management.
- Recruitment, onboarding, and succession planning.
- Workshop: running an effective coaching conversation.

Day 3: Commercial Growth and Customer Experience

- Customer segmentation and value-based service models.
- Needs-based selling and cross-sell planning.
- Portfolio review and relationship deepening strategies.
- Service quality standards, journey mapping, and complaint handling.
- Retention, attrition analysis, and win-back actions.
- Digital channel adoption and customer education.
- Workshop: building a branch growth and retention plan.

Day 4: Credit Quality and Risk Oversight

- Credit quality monitoring at the unit level.
- Early warning indicators and watch list management.
- Arrears management, restructuring, and recovery basics.
- Operational risk, fraud controls, and cash handling oversight.
- Audit readiness, findings follow-up, and control testing.
- Compliance culture and conduct expectations for staff.
- Workshop: reviewing a portfolio for early warning signals.





Day 5: Change Leadership and Management Excellence

- Leading change initiatives and managing resistance.
- Process improvement and efficiency in banking operations.
- Performance dashboards, KPIs, and management reporting.
- Stakeholder management with head office and regulators.
- Personal leadership development and action planning.
- Building a high-performance culture in a bank unit.
- Course review, assessment, and action planning.

Conclusion

By successfully completing Bank Manager Mastery, participants will gain a thorough understanding of banking unit leadership, performance management, commercial growth, credit quality oversight, and change leadership. They will also acquire practical skills in coaching teams, reading performance data, managing risk controls, and improving customer experience. In addition, the course prepares them to lead with confidence and deliver consistent results. Gentex Training Center delivers this programme with a strong focus on real branch practice and measurable performance improvement.

FAQs for Bank Manager Mastery course

Q1 What is the "Bank Manager Mastery" course about?

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It is a five-day programme on leading a bank branch or unit. It covers performance management, team coaching, commercial growth, customer experience, credit quality oversight, risk controls, and change leadership, so participants can run a banking unit that grows and stays controlled.

Q2 What are the key benefits of the "Bank Manager Mastery" course?

Participants gain a structured way to manage performance instead of reacting to monthly numbers. The course improves team productivity and sales capability, strengthens credit quality and control, raises customer satisfaction, prepares managers for audit and compliance scrutiny, and builds a pipeline of capable future leaders.

Q3 What skills will I gain from the "Bank Manager Mastery" course?

Participants gain unit performance management and KPI analysis, team coaching and people development, commercial growth and customer experience management, and credit quality oversight with operational risk control. These four skills cover the full scope of a bank manager's daily work.

Q4 What tools, methods, or standards are covered in the "Bank Manager Mastery" course?

The course covers performance dashboards and variance analysis, KPI frameworks, situational leadership and structured coaching models, customer segmentation and needs-based selling, journey mapping and service standards, early warning indicators and watch lists, arrears and restructuring basics, operational risk and fraud control checklists, audit readiness practices, and conduct and compliance culture frameworks.





Q5 How is the "Bank Manager Mastery" course applied in real-world practice?

Participants apply the methods inside their own units. They set targets and review cycles, run coaching sessions, build growth and retention plans, monitor portfolios for early warning signals, prepare for audits, and lead improvement projects. Many leave with a 90-day action plan for their branch or department.