



element
every bit matters

BRANCH TRAINING

PROGRAM

Turn your people into trusted advisors

Built for Community Banks and Credit Unions

In a world where every branch visit is a chance to connect, Element's Branch Training Program empowers your team to build trust through hands-on learning, real-world scenarios, and mentorship from industry experts.

proper **protocols**

You can train your employees in a number of different ways, but each one isn't universal.

real world skills

Learning skills in a classroom is great, but it doesn't always help when it comes time to apply that knowledge to the branch floor.

employees take charge

Your employees will know more about branch problems than you do.

track **progress**

In order to measure performance, we want to monitor your employees' progress following training.

Element's Branch Training Program

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Key Benefits

A vision for Consultative Branch Experience

Branch Transformation from Transactional to Consultative

- Element trains participants to move beyond transactional tasks and become trusted advisors. This means learning how to ask the right questions, listen deeply, and guide each individual toward more informed financial decisions.

Retail Mindset for Branches

- If you're not thinking like a retailer, you're missing the boat. Element's training instills a proactive, retail-driven approach that engages individuals through every step of their branch visit.

Real-World, Front-Line Readiness

- Element rejects the idea that front-line roles are “entry-level.” Front-line roles are the face of the financial institution and your brand, they are the first impression, and are positioned to build trust day-to-day. Element prepares participants for the complexity and responsibility of being the trusted advisor in an individual’s financial journey.

Consultative Over Sales

- Participants learn that great service isn’t about selling, it’s about solving. Whether it’s guiding an individual to refinance a loan to save on their monthly payment or helping someone understand a higher yield savings option, the focus is on improving lives through empathy and financial insight.

Soft Skills as Core Competencies

- Communication, curiosity, and emotional intelligence are central to the training and not “nice to haves.” Participants practice these through real-life scenarios and receive coaching through industry experts.





Investment

The pricing structure for your training program is designed to ensure optimal engagement.

Your investment determines the level of **strategic planning, on-site training, and ongoing support** available to execute a custom solution. The right investment ensures a seamless, high-impact experience that drives measurable results.