



Relationship Activity Planning

Contact person: Sam M.

Company: National Bank

Action: Refresher training workshop with Sam's team on Relationship Building

By date: 1 June

Notes for this action:

- First step will be to discuss the program with Sam during our monthly lunch in April.
- With Sam's agreement, touch base with each team member to document successes and challenges with implementing the program
- Review findings and gain commitment on the refresher training program by end of May monthly lunch.

