2014 Education/Human Resources Conference 4/22-24 Takeaway Notes

Speaker: Anna Liotta
Topic: Attracting and Keeping the Next Generation of Talent

We all know the Millennials are here; the real question is how we embrace them. We need to find ways to maximize their energy, ideas, and leverage their high expectations to create win/wins.

Takeaways from Anna

- It’s not personal – it’s generational
- Career paths – make it more about them
- Waiting for the tap on the shoulder
- Overall view of working with the different generations
- Generation traps – mentoring down and up
- Making banking fun – banking has so much potential but making it attractive to the Millennials
- Gen X – not wanting someone to hover
- 10-10-10
- Millennials demand, the Gen X craves, and the boomers want
- Recognizing each one of the generations and being able to stay nimble
- People expand or shrink to your listening
- Career paths – pointing out the timeframe
- The top two for Millennials (1) knowing they are making a difference, (2) presenting/meeting the big wigs
- Percentage of keeping people – very short before they stay or not
- Understanding the different generational codes
- Key tools for all generations: (1) Respect, (2) Remember the Mantra (it’s not personal it’s generational), (3) Basic generational principle #1: No generation is right or wrong, and (4) Understand that each generation thinks they are right, and other generations are wrong, because of a lack of understanding of the different generations.

Speaker: Andrea Heuston
Topic: Employee Engagement

The best businesses are those who recognize their employees and strive to increase employee engagement. What is stopping your employees from reaching their fullest potential?

Takeaways from Andrea

- Employee engagement is a core business strategy
- Tiny Pulse (website) – One question survey
- Communicate often
- Start – Stop – Continue
- Know your audience (employees)
- Great to be reminded to “thank” employees and show appreciation
- Goat setting
- The change that “pay” is more valuable now than in the past
- Appreciate the energy of an engaged leader
- Fun in the workplace – engages employees
- The shared idea of creating fun
- Know who your employees are and what motivates them
- If you are going to ask how to engage – listen and apply
• Stand and “walk the ship” get out from behind your desk and walk through the office
• Important to have engaging activities
• Surprised at the percentage of people that sleep at work

Speaker: Jason Swain
Topic: The Authenticity Advantage: Creating Loyalty in an Increasingly Distrustful World
On our hyper-connected world, trust is the new currency – much more important than the quality of your products and services. Learn how to discover your organization’s authentic brand.

Takeaways from Jason
• The Golden Circle
• Going to the moon takes a team
• You have to discover your core values
• Reinforce your core values
• Know where your guiding star is
• Hire the right people and you’re your core values to screen them
• Be yourself
• Be genuine
• Trust is the new currency
• That you can lose trust by not be authentic
• Perfect reputation used to be quality now it is trust and honesty
• Integrity very important
• Develop a Core Values Committee and in incorporate your Millennials
• Gen X does not have the hero’s that the boomers had (like super stars), now it is someone close to them like a mom
• Bottom up to put a hiring committee together beginning to end
• After hiring – explain why you hired them and tie it to the core values
• New people zeroing in on what we do – can break trust

Speaker: Donna Losch
Topic: Healthcare Reform – Now what?
Just when we thought we knew the rules or at least some of them, they are changing again.

Takeaways from Donna
• Prevented care – deductible waived
• As of 2014 this is also true for “grandfathered plans” – deductible waived on preventive care
• When there is nothing to report on Excise tax – then no need to submit the report
• Employees shared responsibility penalties
Speaker: Marcus Mann  
Topic: Harnessing the Resistance to Change  
While change is the basic ingredient of success, the need, speed, and mechanics of change have shifted over the past six years.

Takeaways from Marcus
• Our Change = My Responsibility  
• Harnessing the power of change  
• D2D = Delegate to Develop  
• Stop in the speed of change and see if we have a clear vision  
• Influence ROI – (1) how to we influence (style)? And (2) what is the cost (for you and others)?  
• How do you influence  
• Relationship builders  
• Influence begins when you put it into play  
• Communication – Be there now, undivided attention  
• Taking your old school habits and traits and be open to change  
• Really learn your employees and managing  
• Catching them doing it right  
• Play off of ROI  
• Recognizing your barriers and the dark side of your influence  
• Your influence is a gift don’t force it  
• Critical conversations

Speaker: Don Phin  
Topic: Victims, Villains and Heroes: Managing Emotions in the Workplace  
Enter stage left...we are all actors in a play, for which the stage is set every day, in every workplace.

Takeaways from Don
• What’s my responsibility in it  
• The greatest trap of the hero is over commitment  
• The ability to say no and not over commit  
• The best demonstrations of integrity is to show/admit you made a mistake  
• Only at 40/40 can we both be heroes  
• In efforts to help you could be steam rolling others  
• Baseball analogy  
• The judgment 80/20  
• What comes to you comes from you  
• The list I control the more I accomplish  
• It’s a choice – I need to pause because I don’t know where it’s going to take me  
• Making people feel good about who they are  
• How we deal with what is unfair to us defines our personal culture  
• Planting the good in people  
• Being authentic  
• Drama is where we get our emotions and education  
• Sit when you are upset  
• Avoid conflict – step off the stage  
• Coaxing – taking the first baby step, “Let’s try this and see how it feels”
The fear of failure and who sees that as judgment to yourself
Nobody plays a week victim role with low energy
80% - Don’t want to give up control you don’t win

Breakout Session with Vicki Cussins
Topic: Training That Impacts Performance and the Bottom Line – ROI

Takeaways
- Needs analysis
- Determining ROI
- Is it a training need or poor performance
- Determining the performance gap
- Follow-up
- Standard class evaluation questions

Collaborative Takeaways from the conference
- Authenticity
- Best conference in the best several years
- Learning the generations
- Bringing core values into the hiring process
- Communicating with the different generations
- Trust, Integrity, and Values
- Conference was very informative with great speakers and networking with other bankers
- The topic of the speakers complimented each other
- Murder Mystery dinner theme was a lot of fun