

Retail Sales and Leadership Conference

Thursday, February 22, 2018

Location:

Washington Athletic Club
1325 Sixth Avenue, Seattle, WA 98101

Reservations:

(206) 464-3055

Ask for the WBA Room Block.

Conference Registrations:

	Before Feb. 8	After Feb. 8
WBA Members*:	\$445	\$495
Non-Members:	\$750	\$850

**Attendance at WBA programs is limited to employees, officers and directors of WBA members, non-members eligible for membership in the WBA and members of other state banking associations which grant reciprocal privileges to WBA members.*

Cancellation Policy: Registrations may be cancelled up to seven days prior to the conference. All cancellations have a \$50 charge. No cancellations within the seven day period; however, a substitute may attend.

Registration Form

Please complete the following information:

Name _____

Bank/Company _____

Work Address _____

City/State/Zip _____

Phone _____

Title _____

Email _____

Register: registration@wabankers.com

For more information:

Mail: 1601 Fifth Avenue, Suite 2150, Seattle WA 98101.

Call: (206) 447-1700.

Enclosed is a check for \$ _____

VISA Mastercard Expiration Date _____

Card Number _____

Name on Card _____

Billing Contact _____

Billing Contact Email _____ Phone _____

2018 Retail Sales & Leadership Conference



WASHINGTON
BANKERS ASSOCIATION

1601 Fifth Avenue
Suite 2150
Seattle, WA 98101
www.wabankers.com



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Who Should Attend?

This conference is designed for bankers who are branch managers, retail managers, regional managers and those in sales. As leaders, now is the time to guide retail employees on how to best identify and maximize opportunities with customers. Woven into the agenda are topics that cover the human connection, business development and more. Any banker in a sales position will also benefit.

8:30 - 9:00 Registration and Continental Breakfast

9:00 - 10:00 Welcome

Glen Simecek, President and CEO, Washington Bankers Association, Seattle, WA
Kelli Nielsen, EVP, Retail Banking and Marketing, 1st Security Bank of Washington, Mountlake Terrace, WA; Moderator

Putting Purpose Over Profits

Dan Price, President & CEO, Gravity Payments, Seattle, WA

Nearly 7 in 10 employees in the United States are disengaged with the company they work for. They're unmotivated and uninterested in their work. Dan Price, widely known for setting a \$70k minimum wage at Gravity Payments, brings his vision for the future of business and will discuss topics like intrinsic motivation, employee disengagement, how Gravity sets itself apart, and the why behind his \$70k minimum wage decision.

10:00 - 10:15 Coffee Break

10:15 - 11:15 Deepening Human Connection in an Increasingly Digital World

Joe Sullivan, President & CEO, Market Insights, Seattle, WA

Futurists tell us that every single technological change is now impacting humanity in a much deeper way. And while nearly every human being, regardless of culture or demographic cohort, desires a sense of connectedness, we find ourselves in a tech-enabled, hyper-connected world that can often feel less personal. The companies and organizations that effectively blend the personal and digital experience – both for consumers and employees – are those that enjoy the highest levels of satisfaction and loyalty. This session will explain why building and fostering human connection is key to establishing trust and maintaining competitive advantage.

11:15 - 12:15 Business Development Then and Now – What Has Changed and What Has Remained the Same

Cecilia Johnson, Former Bank Officer, Cascade Bank, Seattle, WA
Andi Martin, Former Bank Officer, Opus Bank, Burlington, WA
David Rosenau, SVP, Retail Division Manager, Banner Bank, Tacoma, WA
Susie Thorne, AVP, Business Specialist, HomeStreet Bank, Seattle, WA

This panel will have two seasoned bankers with over 80 years of collective banking experience, who were in the business before the advent of computers, iPhones, emails or texting and two bankers who have grown up with that technology. All have been very successful in building relationships and increasing their book of business. Learn from the veterans what relationship building skills remained relevant and useful as technology came on the scene, and learn from our younger bankers how they use technology to enhance their business development effort, rather than replace it.

12:15 - 1:30 Networking Luncheon & Table Discussions

1:30 - 2:30 “We Need to Talk” Creating Authentic Connections

Julian Schrenzel, Chief Spontaneity Officer, Improv Alive, Seattle, WA

There are 7.4 billion people living on the earth today. We have more ways to communicate now than we have ever had in the past, and yet more people experience loneliness or isolation in their own communities. In a world of Facebook and Twitter, smart phones and texting, VR and AR, how are we to create meaningful conversations with the people we work and do business with? You'll be taken on a journey of discovery (and rediscovery) exploring how to create authentic conversations.

2:30 - 2:45 Coffee Break

Thank you to our sponsors!

Gravity Payments
Vertical IQ
WBA PROS

For information, contact Donna Madsen at donna@wabankers.com or (206) 344-3484.

2:45 - 3:30 Are We Prepared Bankers? Proper Business Call Preparation Can Help

Bobby Martin, President, Vertical IQ, Raleigh, N.C.

Business buyers of banking products say it's critical that a salesperson understand their specific business needs. They are growing weary of the tired sales model that merely pushes product, place, and presumed or past relationships, while ignoring the unique financial challenges that face their businesses. Customers want bankers who understand their business and who have the capacity and knowledge to work with them collaboratively, as a trusted advisor, to solve the distinct dilemmas they face every day. In this session, Bobby Martin will explain easy-to-implement methods to provide customers what they want.

3:30 - 4:30 What Do Business Customers Value in a Banker?

Jake Dixon, Owner, Work Wear, Inc., Seattle, WA
Brent Esping, President, McCallum Packaging, Seattle, WA
Wayne Lau, Executive Director of Rainier Valley Community Development Fund, Seattle, WA
Dave Lenox, President & CEO, Special Olympics of Washington, Seattle, WA
Matt Lessard, President, Wilcox Construction, Seattle, WA
Clark Schaefer, President, Meeco Manufacturing, Seattle, WA

This panel of business customers will explore how they view their relationship and how they want to interact with their banker. We will discuss what they expect from and what they value most in their relationship with their banker – do they want to receive a call or would they rather just get a text? How often do they want to see their banker? Do they want more digital interaction or less? What could their banker do that would help them the most in growing their business? This panel discussion will provide interesting insight into the way business customers view their banker.

4:30 Prizes & Adjourn