



WASHINGTON
BANKERS ASSOCIATION



EXECUTIVE DEVELOPMENT PROGRAM

2019

I) Welcome



- Introduce WBA staff – and have them explain their roles at the WBA
- Introduce Joe

II) Participant introductions



- Have each participant introduce themselves and answer the following questions
 - Name
 - Where you work
 - Current position
 - How long have you been a banker?
 - Why did you enroll in the EDP?
 - What's your dream job?

III) Why we created the EDP



- We foresaw the need to develop future bank leaders within the state especially during the financial crisis
- Currently most developmental experiences provide a solid depth of experience but lack the breadth needed for executive management leadership development
- It provides a means for local banks to identify their future leaders and prepare them for positions of greater responsibility with the aid of the WBA
- It also gives these future bank leaders a tremendous opportunity of meeting and working with future leaders like themselves from other institutions
- We wanted to create a learning experience for you we feel is unsurpassed in the industry, for individuals with your level of experience, by combining a variety of learning models into a year long educational experience.

IV) Learning model for the EDP



- Experiential (hands on, interactive, learn by doing)
- Self- study and analysis – meet with bank leaders at your institution and others to discuss homework topics and other issues raised during the program
- Team assignments and exercises – just as it's done at businesses around the country today – learning how to work within a team environment
- Mentoring – personalized executive development by a banking professional who will work with you throughout the next twelve months and hopefully challenge you and expand your understanding of the various components of the banking industry and how they're linked together.
- Introspective – analysis of your leadership/management skills and banking knowledge and developmental feedback on personal leadership growth opportunities

Individual Development Plan



- How did you decide to participate in the EDP program?
- How was this decision linked to your individual development plan at work?...or was it?
- How many of you have an individual development plan?
- Assignment before next class – sit down with your boss and put one together
- What are your blind spots?

V) Students Sit with their study group



- **While in your study group share the following information:**
 - Business contact information
 - Arrange for your first conference call
 - Who's conference call number will you be using?
 - Establish dates and times for your conference calls through June
- **Now discuss in your group the following:**
 - What are your biggest concerns about EDP?
 - When you look at the topics being presented which ones will you need the most assistance with?

VI) Assignments and expectations



- A cornerstone of this program is the outside of the classroom experiences and research you will be asked to complete either individually or within different teams.
- The classroom experiences are designed to build upon the independent research and team assignments you will complete prior to attending a class.
- For this reason it is essential that all homework assignments be completed before the start of a class! Not doing so will greatly reduce your learning opportunities and will also retard those of your classmates so we urge you to come prepared for class by completing all of your homework assignments.
Email copies to Sherry and me before class!!!
- Since some of the assignments will be team oriented please be respectful of your classmates by being a responsible team member. Actively participate with your teammates, complete your agreed to duties, and assist your teammates as you would want them to support you.
- Each instructor will come in expecting you to be at a certain level of understanding on their topic based on the homework assignment. We have instructed them to proceed in the classroom from this point forward, thus homework completion is essential.

VI) Review mentorship guide



(Handout)

- Mentees
 - Items
- Mentors
 - Items
- Questions and discussion about mentorship program

VII) Final points



- Class starting times
- Breaks
- What if you're sick and won't be able to attend
- Attendance is expected unless you are sick, the schedule is posted a year in advance to eliminate any work conflicts, etc.
- Talk with your mentor every month
- Participate in your study group conference call without exception!
- Provide us with ongoing feedback on how you are benefiting from the class and what we can do to enhance your experience
- Dress for the classes – (dress comfortably)
- Please be courteous of your classmates and instructors and return from breaks and lunches on time
- We do require that all cell phones be turned off (muted and put away) during class sessions, if there is an emergency you can be reached if an emergency does occur. Please leave them off the table during class
- Review other items contained in email sent to all attendees
- Be sure to complete your homework prior to class and email copies to Sherry and me