



2023 ENGAGE: RETAIL BANKING, TRAINING & HUMAN RESOURCES CONFERENCE

MAY 4-5, 2023 • WASHINGTON ATHLETIC CLUB

May 4

8:00 - 8:30 Registration & Breakfast

8:30 - 9:00 Opening remarks
Glen Simecek, President & CEO, WBA
Joe Micallef, Senior Strategist & Coach, Grow Up Sales; Emcee

9:00 - 10:00 Storytelling: Growing Middle Management
Nick Anderson, Founder, Chosen Leader

What is the hero's journey, and why is it the basis for every great story ever told? How did we learn not to follow a stranger into the woods when we were children? Why do we emulate celebrity artists, athletes, and CEOs? What connects our hearts and minds to the plodding pedestrian ways of corporate compliance? The answer is story. A compelling story captivates attention, ignites the imagination, and inspires action. It is through history that children grow and cultures sustain. And it is through story that managers learn, and perspective is gained.

10:00 - 10:15 Coffee Break

10:15 - 11:15 Breakout Sessions

Retail Banking: Navigating "Class 5" Rapid Change!
Nick Anderson, Founder, Chosen Leader

There are few analogies that fit better for a long-term perspective of change in our industry than rafting in whitewater. Somedays it seems like we are floating along safe and secure taking in the scenery...and then we go around a corner to see massive churning waters and before anyone knows it we've got people overboard grasping for a rope all the while we head into yet another rapid (change). While we know there might be calm waters ahead, when we are in the midst of the whitewater we know there is only one way out and that is through. In this session explore the three most important tools leaders need to deploy in times of rapid change: communication, communication and... communication. Nick Anderson will share his experiences and lessons learned from times of dramatic change to educate participants on the most effective ways to communicate.

Training Breakout Session: Become a More Influential Trainer
Joe Micallef, Senior Strategist & Coach, Grow Up Sales

Joe Micallef, a longtime bank coach, will share valuable insights and practical tips to help Bank Trainers create a more dynamic and appealing coaching culture that will help you attract, develop, and retain talent.

Human Resources Breakout Session: Strategies to Increase Talent Retention, Coach & Engage Your Teams
Robb Rempel, Executive Vice President, Haberfeld

Team members who feel like they are valued and growing are more likely to stay with your organization. The result of decreased turnover is increased productivity and overall profitability. So how do you get there? The key to your financial institution's success is investing in and equipping your team leaders with the skills and tools to effectively coach team members to excellence. During this session, we will explore actionable strategies designed to help your managers develop their teams. In addition, you will leave with tools designed to Cultivate™ growth.

11:15 - 11:30 Coffee Break

11:30 - 12:30 5 Keys to Time Management in Today's World
Debbie Rosemont, Productivity Consultant and Trainer, Simply Placed

In today's crazy-busy world, with input, information and demands on our time coming in from so many sources and at breakneck speed, we need to get smart about how we get the important things done. During this session, participants will learn about the myth of time management, how to define productivity, identify priorities, make a plan to get the right things done and how to produce results with focus.

12:30 - 1:30 Networking Lunch

1:30 - 2:30 Breakout Sessions

Retail Banking Breakout Session: The Elephant in the Lobby, What Your Customers Aren't Telling You
Robb Rempel, Executive Vice President, Haberfeld



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You know what your vocal customers think. Those who love you tell their friends and advocate for you. Those who share their frustrations with your team and you give you the opportunity to “fix” their problems. The customer about whom you need to worry is the silent majority who say nothing. You’ve neither delighted nor annoyed them – they think you are “just fine”. Those customers are the ones most vulnerable to the marketing messages of your competitors. How can you change that narrative and turn those customers into raving fans?

Training Breakout Session: Bank Trainers Make Awesome Leaders - Find Out Why & How

Neal Samaratunga, Vice President, SMB Market & Channel Partnerships, Ken Blanchard Companies

Bank trainers are leaders, they help people grow their capacity to succeed. They also grow leaders, helping others in the organization lead effectively and help create a common language of leadership. This session builds off the morning breakout to introduce leader tools used around the world to coach individuals and leaders to higher levels of sustained success using Blanchard’s SLII model. Attendees will learn to use the tool to adjust coaching and leadership to meet the learner’s needs in the moment.

Human Resources: 10 Top Human Resources Trends

Courtney McFate, Sharholder, Lane Powell

During this session, learn the latest human resources trends and how these changes can and will impact your organization and employees.

2:30 - 2:45 Break

3:00 - 3:30 Solution Room Networking Exercise

Tap into the brainpower and problem solution of those around you during this engaging and dynamic exercise. Participants are asked to bring a challenge to solve and use the expertise and experiences of those around them to find creative solutions!

3:30 - 5:30 Networking Reception

May 5

8:00 - 8:30 Registration & Breakfast

8:30 - 9:00 Welcome, Advocacy Update & State of the Industry

*Glen Simecek, President & CEO, WBA
Matt Deines, President & CEO, First Fed Bank; WBA Education Committee Chair*

9:00 - 10:30 Mentoring Masterclass: Building Better Workplaces One Relationship at a Time

Lisa Fain, CEO, Center for Mentoring Excellence

Mentoring has been shown to be one of the most effective tools to create more inclusive workplaces. But it takes some intention and knowledge to make sure that mentoring efforts don’t fall flat.

In this interactive, engaging 90-minute session, participants will learn the hallmarks of effective mentoring, what distinguishes mentoring from other relationships, how to structure a mentoring conversation for maximum effectiveness and much more.

10:30 - 10:45 Coffee Break

11:00 - 12:00 Recruit, Retain, Mentor, Motivate

Shari Storm, CEO, Category 6 Consulting

How do you recruit and retain top talent when your compensation budget is smaller than your competitors? Learn techniques for building an environment that is drama free, where employees feel valued and empowered. Often small shifts in the way we treat our employees can have long and lasting impact on their job satisfaction. We will discuss ways of handling staff during difficult times; particularly organizational changes.

12:00 Adjourn