

# *Engage* VIRTUAL EDUCATION RETAIL & HR CONFERENCE



**April 24**

**8:30 Welcome**

**8:35 – 9:35 Keynote**

*Nicole Sherman, C-Level Financial Industry Executive/Team and Leader Builder/Connector*

**9:35 – 9:45 Break**

**9:45 – 11:00 Buzz Session Breakouts**

## **Mind Over Matter: The Secret to Happiness and Success at Work**

*Amelia Noel, Master Certified Coach, Amelia Noel Coaching*

Why the No. 1 secret to our happiness, fulfillment and success in our careers isn't what we're doing in the workplace, it's how we're thinking at work.

## **Building a Robust & Inclusive Learning Culture**

*Cynthia Clay, Founder and President, Netspeed Learning Solutions*

Discover how to create a dynamic learning culture within your bank in this insightful session. Learn to identify and apply the five critical elements of a robust learning ecosystem. Explore the four keys to boosting learner collaborations and engagement and gain practical strategies for fostering an interactive learning environment.

## **Empowering HR Excellence**

*Mark Berry, Partner, Davis Wright Tremaine*

Join us for an insightful Employment Law Update designed specifically for bank human resources officers, this session will provide a comprehensive overview of the latest developments and key updates in employment law affecting the banking industry. Gain valuable insights into recent legal changes, important court decisions, and regulatory updates that impact your HR practices. From compliance requirements to best practices in employee relations, this session will equip you with the knowledge and tools necessary to navigate the complex

landscape of employment law with confidence. Don't miss this opportunity to stay ahead of the curve and ensure your bank's HR practices are up-to-date and legally sound.

**11:00 – 12:15 Buzz Session Breakouts**

## **Mastering Retail Banking Sales and Business Development with Data**

*Nicolle DeLiso Bouffard, Director of Training and Success, Vertical IQ*

This session is designed to empower banking professionals with the skills and strategies needed to excel in retail sales and business development. Participants will learn how to leverage data effectively to drive informed decision-making and maximize customer engagement. Through interactive sessions and real-world examples, attendees will gain valuable insights into industry trends, customer behavior analysis, and competitor intelligence. Join us to enhance your retail banking sales acumen and take your business development efforts to new heights.

## **Designing Accessible Training: Strategies for Inclusive Learning**

*Zoe Fisher, Senior Trainer, Sound Transit*

In this hands-on session, you will learn the essential elements of designing accessible training programs. We'll cover the principles of accessible design, practical strategies for creating inclusive content, and ways to foster a supportive learning environment for learners of all abilities. Through real-world examples and case studies, attendees will gain insights into best practices for ensuring that training programs are accessible, engaging, and effective for all learners.

## **Supporting Employee Mental Health and Wellbeing in the Workplace**

*Craig Nelson, Senior Clinical Account Executive, First Choice Health EAP*

Have you ever been concerned about an employee's mental health and not know what to do to support them? In this training, we will identify potential mental health warning signs and appropriate ways to support employees who are struggling with their mental health.

## April 25

### 8:30 – 8:35 Welcome

### 8:35 – 9:35 Collaborate or Capitulate: The Community Bank Internal and External Partnership Imperative

*Jack Hubbard, CEO, Jack Hubbard Consulting*

Forward-thinking community banks remove the silos that isolate people, operations, sales, and learning and development. What's in their hearts is far superior to what is on their business cards, and the customer is always at the center of their thoughts. There's no theory here, just lots of practical ideas, examples, and stories. Have a pen and notepad ready to take these great ideas to the bank.

### 9:35 – 9:45 Break

### 9:45 – 10:55 Buzz Session Breakouts

#### Protecting our Seniors: Elder Fraud Update

Stay ahead of elder fraud with the latest updates for retail bankers. Learn about new scams, red flags, and prevention tactics to safeguard our elderly customers' assets. Discover regulatory requirements and reporting protocols. Strengthen your commitment to protect our seniors and uphold their trust.

#### Unleashing Potential: Understanding Adult Learning and Brain Based Learning

*Greg Brazell, Director of P12 Partnerships, Pierce College*

Explore the world of adult learning with the latest insights from brain based learning! In this enlightening session, we delve into the fascinating world of adult learning neuroscience, exploring how our brains process and retain information as we experience the world. Discover practical strategies grounded in neuroscience and Universal Design for Learning to enhance adult learning experiences, from designing engaging training programs to fostering a growth mindset. Join us to revolutionize your approach to teaching and training, empowering adults to learn more effectively and reach their full potential.

#### Washington State Family Leave Laws Update: Navigating Changes and Ensuring Compliance

*Jennifer Bouman-Steagall, Pacific Northwest Defense Attorney, Red Kite Employment Law*

Stay informed on Washington State's family leave laws and accommodations with our attorney-led update session. Learn about recent changes to the Washington Paid Family and Medical Leave Act and the Washington Family Leave Act, including

eligibility, leave durations, and request processes. Gain valuable insights to navigate these laws effectively and ensure compliance. Join us to stay up-to-date and manage family leave matters with confidence.

### 11:00 – 12:15 Buzz Session Breakouts

#### Navigating the Storm: Strategies for Retail Bankers to Increase Deposits in a Down Economy

*Nicole Sherman, C-Level Financial Industry Executive/Team and Leader Builder/Connector*

Join us to explore strategies to boost deposits in a challenging economy. Learn to leverage digital channels, understand customer behavior, and build customer-centric models. Discover innovative products and cross-selling techniques and explore case studies and compliance best practices. Gain actionable insights to navigate economic uncertainties and emerge as a leader in retail banking.

#### Cultural Empathy in DEI Training

*David Sharpe-Haygood, Consultant, Diversity, Equity, Inclusion, Belonging and Access*

This training provides banking professionals with the tools and strategies to enhance cultural empathy through cultural humility in customer and staff interactions. Participants will learn to recognize and respect diverse cultural perspectives, adapt communication styles, and address potential biases. Through interactive presentations, and case studies, attendees will develop practical skills to create a more inclusive banking and working environment, ultimately improving customer service and satisfaction.

#### Total Compensation Plan Elements and Strategy

*Julia A Johnson, Director, Organization Development & Talent Management, Wipfli*

Total compensation is a "hot topic" for executive leadership. It is a primary consideration for attracting and retaining high performing employees at all levels within the bank. How you reward executives directly affects your ability to attract, retain, and reward talent within leadership positions. It is critical that the bank focuses on a total compensation strategy to ensure alignment with bank, department, and individual performance. This session focuses on how to strategically and effectively manage your total compensation plan and compensation "mix" to achieve bank goals and objectives while remaining responsive to the needs of employees. At the conclusion of this session, participants should possess a working knowledge of total compensation plan elements, compensation strategies, and the importance of linking pay with performance.

### 12:15

### Adjourn