

VIRTUAL EDUCATION

Engage

RETAIL & HR CONFERENCE



April 24

8:30 Welcome

8:35 – 9:35 “Engage” Like You Own the Place! If It Is To Be, It Is Up To Me.

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

This keynote is thought-provoking, humorous, and enlightening. It's a game-changer for leaders at every level. It explores the mindset and strategies required to approach challenges and opportunities with an entrepreneurial spirit, and engagement is the key. Drawing from the experiences of successful business leaders and entrepreneurs, this presentation parallels the key principles of engaging like a business owner to ultimately achieving your own success professionally and personally. This session will equip you with the tools to differentiate yourself in the market, build authentic connections, and achieve sustainable success.

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

The Value of Industry Specialization Throughout the Sales Process

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

Banking professionals know that it's more important than ever to become a trusted advisor in the eyes of their customers and prospects— doing so efficiently and effectively is the challenge. Participants will learn how industry specialization will enable them to become more timely, credible and confident by fully understanding a targeted prospect's industry. Join us to learn what insights are valuable to business owners, how to source and leverage data to create an effective contact strategy, and become a trusted leader in your bank.

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 com-

pliance. Join us to stay up-to-date and manage family leave matters with confidence.

11:00 – 12:15 Buzz Session Breakouts

The Deposit Whisperer: From Gathering to Growing

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

This session was designed to empower bankers to excel in the art of deposit gathering and maximize your overall effectiveness. It sheds light on the importance of a proactive mindset and adopting strategic approaches to generate and cultivate your deposit base. Learn the necessary skills and tools to overcome common challenges, grow deposits, and leverage technology for enhanced productivity, while optimizing your efforts, achieving higher conversion rates, and ultimately elevating your overall performance and success. Through the proven techniques outlined below, attendees will learn how to identify potential leads, effectively engage with clients, and nurture valuable relationships to drive deposit growth.

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