

2025

VIRTUAL ENGAGE CONFERENCE



April 29

8:30 – 8:35

Welcome

Glen Simecek, President & CEO, WBA

8:35 – 9:35

Mentoring 2.0 – How to Make the Most of Your Mentoring Time

Lisa Z. Fain, Center for Mentoring Excellence

Maximizing the mentoring experience requires intentional planning and action. This session dives into advanced mentoring strategies, from leveraging technology to structuring impactful conversations. Participants will leave with actionable tips to elevate their mentoring practices and achieve meaningful, measurable results.

9:35 – 9:45 Break

9:45 – 10:45 Demystifying Artificial Intelligence in Banking

Shonna Kracinski, Chief Human Resources Officer, Midlands State Bank

10:45 – 11:00 Break

11:00 – 12:00 Breakout sessions

Bankers Care Panel Discussion

Duncan Taylor, SVP/Chief Operating Officer, WBA
Megan Managan, Director of Public Affairs, WBA

Discover how Washington's banking community is making a tangible difference through Bankers Care, an initiative that began during the Great Recession as an annual food drive in partnership with Northwest Harvest. Today, Bankers Care has evolved into a comprehensive program encompassing financial literacy, education, and various philanthropic efforts. By collaborating with organizations like Bank-Work\$, Financial Beginnings, and Safe Banking for Seniors, Bankers Care empowers individuals with essential financial skills and supports community resilience.

Developing First-Time Managers: Rethinking Leadership Growth

Sherry Johnson Metz, Lead Forward Consulting, Learning Architect, Coach, Consultant

Leaders set the tone for engagement, adaptability, and retention—yet many feel overwhelmed by expanding responsibilities. With AI, hybrid work, and shifting demands, traditional leadership development isn't

enough. This session will also discuss the evolving capabilities today's managers need to succeed, who owns first-time manager development—and who should, how to balance structured training with real-work learning, and ways to build a learning culture where new managers feel supported.

Employment Law Update

The legal landscape is shifting—are your HR policies keeping up? From AI-driven hiring and remote work compliance to new rulings on workplace policies, this fast-paced session will break down what's changing in 2025 and what it means for your bank. Led by a top employment attorney, we'll navigate the latest regulations, tackle common pitfalls, and arm you with strategies to stay ahead of legal risks. Expect clear insights, real-world examples, and practical takeaways tailored for bank HR professionals. Don't just keep up—get ahead and protect your bank from costly missteps!

12:00 – 12:45 Lunch

12:45 – 1:00 Industry Update

Matt Dienes, President & CEO, First Fed Bank

In just 15 minutes, we'll explore the key economic and regulatory trends shaping the industry, the evolving role of technology and AI in retail banking, and the workforce challenges facing banks today. Gain valuable insights into what's ahead for our region's financial institutions and how retail bankers, trainers, and HR professionals can adapt and thrive in this dynamic environment. Don't miss this opportunity to hear directly from a leader navigating these challenges at the highest level!

1:00 – 1:55 Breakout sessions

Focus on Revenue Growth

J.R. Covey, OneAccord

Goal Setting To Drive Results as a Team

Eric Girard, Girard Training Solutions, LLC.

Goal setting is a critical skill in any organization. This presentation will teach you how to set good, SMART goals. By the end of this program, you should be able to effectively contribute to the strategic process of creating and prioritizing team goals and use a streamlined process to select goals that support company, department, and team strategies.

2:00 – 3:00 Closing Session

3:00 Adjourn