

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** **AI Unplugged: Lessons and Practical Applications for Financial Institutions**
Shonna Kracinski, Chief Human Resources Officer, Midlands State Bank

Discover how generative AI is transforming the banking industry in this dynamic session tailored for financial leaders. Midland States Bank will share its journey of adopting AI, highlighting lessons learned and practical applications that have driven success. Attendees will experience a live “show-and-tell”, showcasing real-world examples of generative AI in action. Learn how to identify high-value use cases, write effective prompts, and integrate AI tools to enhance productivity and innovation in your organization. This session will demystify AI technology and provide actionable insights to help you stay ahead in a rapidly evolving industry. Whether you’re an AI enthusiast or just getting started, you’ll leave with strategies to unlock the potential of generative AI for your bank. Don’t miss this opportunity to gain practical knowledge and inspiration for your AI journey.

- 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 BankWork\$, 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.

2025 Employment Law Update: Protect, Prepare, and Thrive
Mark Berry, Partner, Davis Wright Tremaine

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!

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1:00 – 1:55 Breakout sessions

The Relationship Between Your Stories & Your Success

J.R. Covey, Consultant & Sales Psychologist, OneAccord

In this session, J.R. Covey will dive into the transformative impact of unchecked thoughts and internal narratives on organizational success in banking. Participants will discover how harnessing the power of metacognition and narrative development can reshape their approach to decision-making, relationships, and performance—both individually and within teams.

You'll uncover how the stories you tell yourself shape your decisions, actions, and outcomes, and how to turn those narratives into your greatest asset, learn ways to break free from limiting beliefs and learn powerful techniques to identify and challenge the self-imposed barriers that prevent growth, while enabling yourself to push past limitations and accelerate success. The session will also help you transform the way you engage to explore the role of metacognition and how awareness of your thought processes can revolutionize client interactions, team dynamics, and company culture.

It will help you learn how shifting internal narratives can lead to stronger relationships, optimized results, and sustainable success across all levels of your organization.

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.

Creating a Culture of Feedback

Chris & Michelle Wheatley, Wheatley Leadership Group

The ability to easily communicate feedback is one of the clearest signs of a team's health. While much attention is paid to the skills of giving feedback, we often overlook the difficult job of receiving feedback. In this session, you'll learn a simple four-step technique to receive even the toughest feedback. You'll learn tricks to avoid defensiveness, learn from challenging situations and establish yourself as coachable and growth-oriented. You'll also learn how to quickly implement these techniques in your organization and build a culture where feedback is a natural and frequent form of communication.

2:00 – 3:00 The Future of Banking Leadership: Navigating Change Across Generations

Christopher Thompson, Founder, CORE Inclusive Consulting

The banking industry is experiencing a seismic leadership shift, and change management is the key to navigating this transformation successfully. As Baby Boomers retire and Gen X steps into leadership, Millennials and Gen Z are redefining workplace expectations, innovation, and customer engagement. This keynote will equip retail bankers, HR leaders, and trainers with strategies to manage these generational transitions effectively, overcome resistance, and foster a culture of adaptability. Learn how to lead with flexibility, implement strategic change initiatives, and develop future leaders through mentorship and education. By embracing change as a driving force, banks can build agile teams, strengthen leadership pipelines, and stay ahead in an evolving financial landscape. Walk away with actionable insights to turn disruption into opportunity and ensure long-term success in a rapidly shifting industry.

3:00

Adjourn