



# 20 Virtual Engage 26 Conference

**8:30 – 8:35 a.m. Welcome**  
*Duncan Taylor, President & CEO, WBA*

**8:35 – 9:35 a.m. Some Assembly Required: The 3C Model for growth and Development**  
*Ned Pauley, Founder & President, The Signify Group*

From your newest hire to your most experienced leader, no one has fully reached their potential. Leaders have the privilege of fostering growth. In this session, you'll learn the 3C Model — connect, coach, challenge — with actionable steps to create connection, master coaching, and challenge effectively. Practicing the 3C Model boosts team engagement, ownership, and growth, while giving leaders deeper satisfaction from impacting lives.

**9:35 – 9:45 a.m. Break**

**9:45 – 10:45 a.m. Return on Intelligence: Building Smarter Banks Through Human + AI Collaboration**  
*Paul Carney, Founder, Ishtot Inc.*

Join us for an engaging and practical session exploring the "Return on Intelligence" framework, which demonstrates how leading banks leverage AI to rapidly develop talent, enhance leadership pipelines, and strengthen organizational culture. Attendees will learn to reframe AI ROI from mere cost-cutting to capability-building, uncover the "multiplier effects" of AI that speed up decision-making, learning, and innovation, and apply the 10 Dimensions of Return on Intelligence to upskill teams and promote responsible AI use. Additionally, the session will offer strategies to effectively communicate AI's value to executives, using language that resonates with CEOs, CFOs, and CHROs.

**10:45 – 11:00 a.m. Break**

**11:00 – 12:00 p.m. Breakout sessions**

**Education – Leaders Grow Others Through Coaching Conversations: Being More Coach-Like as a Leader**, *Sherry Johnson Metz, Chief Learning Architect, Lead Forward Consulting*

Many leaders step in to help or fix problems because they care deeply about results and their people. But over time, this can lead to burnout for the leader and disengagement for the team. In this interactive session, you'll discover how shifting from "solving" to "coaching" helps others think, act, and grow with greater ownership.

**Retail – Community Bank Retail Leaders Forum: The New Playbook for Retail Growth**, *Charmaine Lighthart, EVP/Chief Retail & Digital Engagement Officer, Riverview Bank; Kelli Nielsen, EVP/Chief Retail Banking Officer, 1st Security Bank of Washington; Todd Valley, SVP/Director of Deposit Operations, Columbia Bank*

In today's competitive, rate-sensitive, and digitally driven environment, community banks must rethink how they grow. Deposit strategies alone are no longer enough—sustainable success requires a deliberate focus on relationships, relevance, and community connection. In this executive panel, senior retail banking leaders from community banks in Washington and Oregon share how they are redefining growth. From evolving deposit strategies and strengthening client relationships to turning community involvement into meaningful referral pipelines, this discussion will highlight what is working now—and what's next.

**Human Resources – The Future of Benefits, USI Insurance Services Panel**

The employee benefits landscape is changing fast, and staying ahead requires more than just reacting to annual renewals. In this forward-looking virtual session, a panel of USI specialists — including experts in wellness, ERISA compliance, underwriting, and consulting — will break down the trends, risks, and opportunities that are redefining benefits planning. From high renewals and cost-containment strategies to pharmaceutical management, AI's growing role in benefits, marketplace changes such as TrumpRx, and emerging compliance



# 20 Virtual Engage 26 Conference

concerns, this session will deliver the insight organizations need to make smarter decisions today while preparing for what's next.

## 12:00 – 12:45 p.m. Lunch

**12:45 – 1:00 p.m. Industry & Advocacy Updates**  
*Duncan Taylor, President & CEO, WBA*  
*Megan Managan, EVP/Director of Public Affairs, WBA*

This session will provide a high level update about the industry as a whole, as well as a look at where banking policy stands in 2026, from the Washington state Legislature and Congressional viewpoints.

## 1:00 – 1:55 p.m. Breakout sessions

**Retail – The New Math of Deposit Growth: Focusing on Retention, Relationships, and Relevance, Joe Sullivan, President, Market Insights**

Rising rates, digital disloyalty, and demographic disruption have made old deposit strategies obsolete. Primacy is no longer guaranteed, loyalty must be earned in real time, and growth depends on precision—not just promotions. This session unpacks the new math of deposit growth and shows how community banks can respond with smarter, more sustainable strategies.

**Education – Building the Bench: A Practical Succession Planning Framework for Today's Banks, Michael Kadel, Managing Principal, OneAccord**

Succession planning is no longer optional, it's a strategic priority for banks competing for talent, continuity, and growth. This practical session delivers a clear, adaptable

framework to help banks identify, develop, and retain high-potential talent across critical roles. Designed for human resource professionals, trainers, and bank leaders alike, this session provides practical tools and a flexible framework you can implement immediately to strengthen your leadership pipeline.

**Human Resources – Employment Law in Motion: What Bank HR Leaders Need to Know in 2026, Priya Vivian, Partner, and Christine Thelen, Partner, Ballard Spahr**

Employment law continues to evolve—and HR teams at community banks are expected to keep pace. Join Priya B. Vivian and Christine Thelen of Ballard Spahr for a practical update on the latest employment law developments impacting banks in Washington and Oregon. This session will highlight key changes since 2025, emerging compliance risks, and actionable guidance to help your bank navigate today's workplace challenges with confidence.

**2:00 – 3:00 p.m. Leading Through Uncertainty: How to Use Change to Accelerate Performance**  
*Matt Gjertsen, Founder, BUILT*

Change is no longer the exception, it's the rule. But constant change often leaves teams confused, burned out, or resistant. The leaders who succeed are those who make the unclear clear, setting expectations that give their teams direction and confidence. This workshop equips managers with simple tools to communicate with clarity, align priorities, and guide teams through uncertainty. Participants will learn how to keep people focused and adaptable, turning change from a source of stress into a chance for progress.

**3:00 p.m. Adjourn**