



20 Virtual Engage 26 Conference

May 20

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.

Training Breakout

Human Resources Breakout

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 Track: 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.

Training Breakout

Human Resources Breakout

2:00 – 3:00 p.m.

Leading Through Uncertainty: How to Use Change to Accelerate Performance
Matt Gjertsen, Founder, Better Every Day Studios

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.