



MANAGEMENT DEVELOPMENT PROGRAM

Providing a Strong Foundation
for the Next Generation
of Northwest Bankers

April - August 2023

WBA Members*: \$2,750, \$3,250 after March 10

Non-Members: \$3,250, \$3,550 after March 10



Register Here:
www.wabankers.com/mdp

WHO SHOULD ATTEND?

WBA's Management Development Program (MDP) is an excellent preparatory program for bank managers wishing to advance their careers. This is a class designed for those who have aspirations of broadening their understanding of the key success elements required to manage a successful banking organization. Some MDP graduates go on to enroll in the WBA's more advanced Executive Development Program.

HYBRID PROGRAM

Certain sessions in this program has been moved to a virtual format, while the first and last classes will be held in person in Seattle. Virtual sessions will be held via Zoom, where they will be able to interact with each session instructor, ask questions and learn from their fellow classmates. Networking is a key aspect to WBA's Development Programs, so we have designated the last hour of the second day of class each month to be dedicated to networking.

THE BIG PICTURE: TODAY'S COMPETITIVE BANKING ENVIRONMENT

April 13, 2023 • 8:30 - 3:30 pm

Banking today is a challenging, competitive and ever-changing industry. What worked in the past may not work going forward. This challenging landscape requires leaders and managers who can create an environment in which their employees not only perform, but also grow and develop into the leaders of tomorrow. The market is crowded with multinational, regional and community banks, not to mention credit unions and non-bank competitors. What do bankers need to do to keep the confidence of the American people and their local communities? How can banks attract and retain the best and brightest talent available? The second half of the day will be spent reviewing the learning methodology of the Management Development Program, discussing the role of the mentor relationship, reviewing program expectations and more.

SESSION HIGHLIGHTS

Discuss critical issues facing the banking industry today, including:

- Reduction of the number of banks in the U.S.
- The impact of shrinking margins on bank profitability
- Impact of a changing bank environment
- Finding talented employees for your bank's continued success
- Changing customer expectations and how they are utilizing bank services today

Instructor: Drew Wilkens, SVP/Strategic Projects, SaviBank



THE HIGH-IMPACT OF EMOTIONALLY INTELLIGENT LEADERSHIP • VIRTUAL

May 17, 2023 • 8:30 - 10:30 am; 1:00 - 3:00 pm

May 18, 2022 • 8:30 - 11:30 am

Recent studies have shown emotional intelligence to be a key factor in leadership effectiveness, specifically, in a rapidly changing business environment. Emotionally intelligent managers create psychologically safe workplaces that lead to improved employee job satisfaction, retention, creativity, performance, and wellbeing. Emotionally intelligent leaders recognize and leverage emotions as a latent capacity and a reservoir of human capital to benefit their organizations and impact the bottom line. They have the self-awareness and skills to manage their own emotions as well as influencing others. Emotionally intelligent leaders motivate and respond to the needs of their staff through active and empathic listening and promoting high-trust relationships.

SESSION HIGHLIGHTS

- Explain what emotional intelligence is and the difference between IQ and EQ.
- Outline the key components of emotional intelligence
- Understand why emotionally intelligent leaders are more effective
- Explain the role of emotional intelligence in building high-trust relationships
- Understand how vulnerability is a key component of self-reflection
- Use emotional intelligence to become a more effective leader
- Leave you with some everyday tools to use for improved awareness

Instructor: Vicki Kraai, InterAction Training



THE PERFORMANCE MANAGEMENT PROCESS: SELECTING, DEVELOPING AND RETAINING STARS • VIRTUAL

June 14, 2022 • 8:30 - 10:30 am; 1:00 - 3:00 pm

June 15, 2022 • 8:30 - 11:30 am

Team members need to understand how their work contributes to the overall success of the organization. By ensuring they understand this connection, the Performance Management Process (PMP) helps drive an organization's productivity and success. The manager plays a critical role in a successful performance management process: planning and encouraging mutual involvement and accountability, monitoring and providing proper direction, coaching for change, and evaluating results. Unfortunately, too often team members receive little or no feedback on their performance. When challenged with why this is occurring, managers often mention that they lack time; the "process" is too complicated; they have insufficient staff; or that they are concerned with employee morale. The PMP helps managers answer their employees' key questions related to performance, including: What do you want me to do? Why is it important? How do you want me to do it? How will I know if I am successful? What's in it for me?

SESSION HIGHLIGHTS

Improve your team by learning both the "what" and the "how" of:

- Getting the right person onboard
- Understanding the latest in employment law
- Interviewing do's and don'ts
- Motivating team members and beyond
- Coaching and contracting for change
- Four phases of the PMP

Instructor: Karl Ahlrichs, HiringSmart



HOMEWORK AND MENTORS

Participants are required to complete monthly assignments. This prepares them to best understand the topics, challenges them to be proactive in their learning, and to seek out the advice of key individuals within their own institution when needed. Mentors are a required part of the program, and act as a sounding board to assist in understanding new concepts.

EFFECTIVE INTERPERSONAL CONFLICT AND PRINCIPLED NEGOTIATION • VIRTUAL

July 12, 2023 • 8:30 - 10:30 am; 1:00 - 3:00 pm
July 13, 2023 • 8:30 - 11:30 am

Effective managers are problem solvers whom employees can rely on to mitigate difficult situations. In today's banking environment, those with a positive pattern of negotiating ethical solutions quickly become the most valuable players in their organizations. This session is about recognizing patterns of conflict, defining the clash, and mustering the courage to leverage change and create solutions. Participants will be armed with the necessary tools to effectively negotiate to find solutions. This session includes no lecture as participants will be negotiating a live scenario-based conflict within the first 30 minutes. The remainder of the day will be dedicated to interactive banking-related challenges and diffusing common emergencies.

SESSION HIGHLIGHTS

In order to build your ability to produce results you need to:

- Understand the value and importance of productive conflict
- Understand intent vs. impact and its role in interpersonal conflict
- Practice a technique to overcome interpersonal conflict
- Identify your standard conflict strategies and their consequences
- Learn a new approach to negotiation that opens the possibility of both parties getting more of their needs met
- Practice using the new negotiation approach

Instructor: Chris Wheatley, Wheatley Leadership Group



COMMUNICATING FOR RESULTS: CLEAR COMMUNICATION, LISTENING, AND BEING HEARD • VIRTUAL

August 2, 2023 • 8:30 - 10:30 am; 1:00 - 3:00 pm
August 3, 2023 • 8:30 - 11:30 am

Critical to the success of bank leaders and their organizations is how well they communicate. Understanding one's own limiting perceptions and blind spots is paramount to listening and speaking effectively. Listening skills impact job effectiveness and the quality of professional relationships. By becoming a better listener, productivity, the ability to influence, persuade and negotiate — all will improve thus helping to avoid conflict and misunderstandings. Organizations demand constant feedback. Leaders who are skilled in handling difficult conversations exude confidence and respect. Job satisfaction is most impacted by how much individuals feel appreciated and valued for their work,

rather than by their salaries or benefits. This session will introduce ways to help determine how to develop teams that feel appreciated and to master the art of successful communication.

SESSION HIGHLIGHTS

- How to build critical communication skills
- Become aware of perceptions and blind spots
- Expand listening skills to draw out critical conversations
- Learn effective day-to-day communication
- Deliver powerful and effective feedback to all levels of the organization
- Understand how team members feel valued and appreciated

Instructor: Karen Butcher, InterAction Training



EMPLOYEE ENGAGEMENT AND CUSTOMER SERVICE: THE IMPORTANCE OF THEIR LINK TO BANK PROFITABILITY

August 10, 2023 • 8:30 - 3:30 pm

There is an obvious disconnect between the service banks think they are providing and the reality of what customers experience. No banks appear on the lists of the top service providers in the United States. Yet when bank employees are asked to rate the customer service level of their bank they are consistently rating themselves highly. Banks aren't alone in this misperception. In the U.S. today, 80 percent of companies think they provide good service, but only 8 percent of their customers agree. But this disconnect can be especially harmful because we have limited opportunities to interact with our customers — many only visit their banks six times a year! Correcting these issues requires a workforce that is highly engaged. Research proves that companies with highly engaged employees beat the market and their peers when it comes to profitability. So how can bank managers engage their employees, produce excellent customer service and in turn enhance our profitability?

SESSION HIGHLIGHTS

Learn how to take your bank's service to the next level by:

- Analyzing what top service providers do differently to make a significant impact in service quality
- Assessing a bank's service levels and comparing them to service leaders
- Identifying key service metrics
- Shopping and measuring what the competition is providing vs. these metrics
- Discussing the impact an engaged workforce has on a bank's profitability

Instructor: Drew Wilkens, SVP/Strategic Projects, SaviBank



COST FOR PROGRAM

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SPEAKER PROFILES

Karl Ahlrichs is the founding partner of HiringSmart, a consultation firm focused on aligning applicants with organizations values. He is a national expert in the people part of business and has a long list of clients spread across the country, ranging from helping restructure Apple computers in Silicon Valley, to career centers in Louisiana. He is a SPHR and has an extensive background in hiring, training, communications and writing. This is his third year teaching with WBA.

Karen Butcher, is the head coach and pivotal people trainer at InterAction Training. Her work has included being a high school economics teacher, 4-H youth agent, Mary Kay sales director, and director of training at a community bank in Kentucky. She has seen the need for a new leadership philosophy to hold leaders and their teams accountable and let go of outdated practices.

Vicki Kraai is the CEO of InterAction Training, educator, speaker and consultant with over 25 years of financial services experience. She started her career as a bank teller, before eventually becoming CEO. She was a member of the management team which launched the Cabela's credit card program and brings a highly engaging approach to her training. She is a faculty member for the Graduate School of Banking in Wisconsin and other SBA schools.

Chris Wheatley owns Wheatley Leadership Group, and thanks to over 10 years of experience in management, leadership and training, helps develop individuals, teams and organizations into healthy and productive organizational environments. He spent over a decade at Gonzaga University in various leadership roles. He currently works with corporate and non-profit clients.

Drew Wilkens is currently the Senior Vice President of Strategic Projects for SaviBank. Prior to that, he was an executive vice president for a regional community bank, responsible for the mortgage, retail, and business banking sectors, where he worked for over 15 years. He received his Master of Business Administration (MBA) from Western Washington University and has remained on staff as an instructor, teaching an undergraduate management class that covers corporate governance, corporate social responsibility, ethical decision-making, and stakeholder management, along with diversity, equity, and inclusion, for the College of Business and Economics. He also earned a degree from the Graduate School of Banking at Colorado in 2011.

ATTENDANCE

Students can miss one class during this program, which can be made up the following year. If more than one class is missed, the student will not receive their graduation certificate.

Email Completed Registration: reg@wabankers.com

Mail: WBA, 601 Union Street, Suite 1720, Seattle WA 98101

Call: (206) 447-1700 Online: www.wabankers.com/mdp

Recommended Prerequisites

Before joining the WBA's MDP, we strongly recommend several courses to help you prepare and be successful. These courses are offered through the ABA and are available online at your convenience. Contact WBA for more information about registration.

Leadership In Action Suite

Management Essentials Suite

Fundamentals of Small Business Banking Suite

**Attendance at WBA programs is limited to employees, officers and directors of WBA members, non-members eligible for membership in the WBA and members of other state banking associations which grant reciprocal privileges to WBA members.*

Cancellation Policy: For all cancellations that occur up to 14 days prior to the start date, a \$300 cancellation fee will be charged. For cancellations with less than seven days notice, there will be no refunds. A substitute can attend at no fee. For cancelled courses and/or seminars, full fees will be refunded. Cancellation Procedure: Cancellations must be sent in writing to the WBA office via email, fax, or mail. No refunds will be granted until a written cancellation request is received by WBA.

