



# MANAGEMENT DEVELOPMENT PROGRAM

**April - August 2024**

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

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

*Providing a Strong Foundation for the Next Generation of Bankers*



Register online: [www.bankerscontent.com/24mdp](http://www.bankerscontent.com/24mdp)

# 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.

## THE BIG PICTURE: TODAY'S COMPETITIVE BANKING ENVIRONMENT

April 11, 2024 • 8:30 - 3:30 pm • *WBA in Seattle*  
April 25, 2024 • *UBA in Salt Lake City*

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



## LEADERSHIP FOUNDATIONS: BUILDING CREDIBILITY, COMPETENCE AND CONFIDENCE • VIRTUAL

May 16, 2024 • 8:30 - 10:30 am; 1:00 - 3:00 pm  
May 17, 2024 • 8:30 - 11:30 am

Personal integrity, trustworthiness and adaptability are the foundation of any leader. In this interactive session, you will learn practical skills for developing and communicating your values, managing your priorities, and adapting your style to get the most out of yourself and those around you. These foundational skills will allow you to effectively lead and support your team to accomplish ambitious goals and serve your organization's mission.

### SESSION HIGHLIGHTS

- Clearly understand and communicate your leadership

philosophy, values and priorities.

- Develop habits to strengthen your self-awareness.
- Learn how to establish trust and credibility with your colleagues and customers.
- Learn practical skills for managing time, energy and workflow even during change and uncertainty.
- Strengthen your leadership versatility and adaptability.

**Instructors:** Dr. Michelle Wheatley and Chris Wheatley, Wheatley Leadership Group



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

June 13, 2024 • 8:30 - 10:30 am; 1:00 - 3:00 pm  
June 14, 2024 • 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. This program also includes a strategic project, specific to each individual and worked on throughout the course. Mentors are a required part of the program, and act as a sounding board to assist in understanding new concepts.

## HIGH-IMPACT DEVELOPMENT CONVERSATIONS • VIRTUAL

July 11, 2024 • 8:30 - 10:30 am; 1:00 - 3:00 pm  
July 12, 2024 • 8:30 - 11:30 am

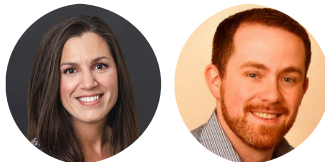
The quality of our conversations directly impacts the quality of our leadership. This session will introduce a simple and highly effective approach to any conversation with opportunities for practice in the areas of coaching, giving and receiving feedback, and delegation. You will learn techniques for overcoming defensiveness, asking powerful questions to discover underlying needs, and how to strengthen relationships, even during challenging conversations.

### SESSION HIGHLIGHTS

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

- Learn a simple and powerful framework for any leadership conversation.
- Develop skills to strengthen your coaching approach.
- Explore barriers to difficult conversations and how to overcome them.
- Practice models for receiving and providing difficult feedback.

**Instructors:** Dr. Michelle Wheatley and Chris Wheatley, Wheatley Leadership Group



## EFFECTIVE INTERPERSONAL CONFLICT AND PRINCIPLED NEGOTIATION • VIRTUAL

August 1, 2024 • 8:30 - 10:30 am; 1:00 - 3:00 pm  
August 2, 2024 • 8:30 - 11:30 am

Conflict is a normal and natural part of communication within organizations. Effective managers ensure that conflict is directed at moving the team forward, solving difficult problems and enhancing relationships. Participants will learn how to effectively manage both interpersonal conflict and negotiation at all levels of the organization. Through engaging activities and learning simple, powerful models, you will leave with more confidence and competence in navigating conflict.

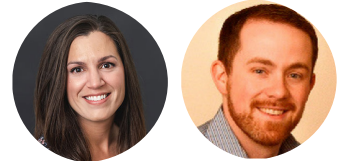
### SESSION HIGHLIGHTS

- 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.

**Instructors:** Dr. Michelle Wheatley and Chris Wheatley, Wheatley Leadership Group



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

August 21, 2024 • 8:30 - 3:30 pm • WBA in Seattle  
August 22, 2024 • UBA in Salt Lake City

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

- WBA & UBA Members\*: \$2,750, \$3,250 after March 10
- Non Members: \$3,250, \$3,550 after March 10

## 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.

**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.

**Michelle Wheatley** owns Wheatley Leadership Group, and has worked in a variety of roles at Gonzaga University for the past 13 years. She became the Director of University Ministry in 2013, Assistant Vice President for Mission and Ministry in 2017, and Vice President in 2019. She currently serves on several boards in the Diocese of Spokane, including the Immaculate Heart Retreat Center, the Nazareth Guild, and Gonzaga Preparatory School.

**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.

The in-person sessions of this program will be offered in Utah and Washington separately, while virtual sessions will be held together.

Register online: [www.bankerscontent.com/24mdp](http://www.bankerscontent.com/24mdp)

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

Call: (206) 447-1700 Online: [www.wabankers.com/mdp](http://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.*

