

PRESENTATION OVERVIEWS

PSYCHOLOGICAL SAFETY FOSTERS POSITIVE CHANGE

Session Overview: As we lead change, we are focused on creating an environment where people are ready for and can adopt change. To do that, we need to understand the organization’s culture and environment and one of the most important aspects of culture is that people inherently feel psychologically safe. Amy Edmonson from Harvard defines psychological safety as “a belief that one will not be punished or humiliated for speaking up with ideas, questions, concerns, or mistakes, and that the team is safe for interpersonal risk-taking.” It is a simple concept, but it isn’t necessarily easy to create. How can leaders instill an environment of psychological safety that helps to enable positive change?

HELPING TEAMS THRIVE IN A VUCA WORLD

Session Overview: An environment of volatility, uncertainty, complexity, and ambiguity (VUCA) is becoming more prevalent in the business world. To help lead teams through this environment, leaders need to understand behaviors and Organizational Change Management (OCM) strategies to incorporate to build greater change agility and resilience. This change leadership session is intended for all leaders who are sponsoring and guiding others through change.

SUPPORTING AN AGILE JOURNEY THROUGH SHIFTING MINDSETS

Session Overview: Organizations want to become more responsive and adaptable to customer needs and changes in the industry, and leaders in those organizations are turning toward Agile to do so. Agile helps organizations deliver value sooner to remain competitive in their market, but organizational change management practitioners must consider how to support leaders and employees better as the organization adopts an “Agile mindset” to “being Agile” instead of just “doing Agile.”

ORGANIZATIONAL CHANGE MANAGEMENT (OCM) – SUCCESSFULLY LEADING CHANGE

Session Overview: This workshop is for trainers, team members, executives, leaders, or managers who need to effectively guide others through change. It is intended for credit unions as they continue to experience disruptive, large, or ongoing change and want to improve how they are preparing and supporting their people to successfully adopt those changes.

THE STATE OF CREDIT UNION STRATEGY

Session Overview: We know the “state of the credit union industry” – but what does that mean for your strategy? The old threats remain taxation and regulation. Ongoing issues look different: the economy, succession planning, talent acquisition and development, and member-centricity. We think about old concepts in new ways: DEI, financial well-being, and FinTech. It’s a lot – but it is also a huge opportunity. Let’s discuss where to focus and how to take advantage of these opportunities.

WHAT A BOARD WANTS

Session Overview: You meet with them every month or more – but do you really know what your board wants? Maybe. Have the meetings become routine and non-productive? Sometimes. Are you getting what you want from your board? Usually. Sounds like a situation that is totally fine – but who wants to settle for fine? Let's identify steps you can take to increase board relationships and overall engagement and foster a productive board experience.

WHAT A BOARD NEEDS

Session Overview: Being a volunteer board member comes with a lot of responsibility. What do you need to deliver on that responsibility? What do you need from your CEO and the leadership team? And what do you need from your fellow board members? And how can you get what you need? We will discuss how to assess those needs and then determine how to meet them.

WHAT A BOARD WANTS & WHAT A BOARD NEEDS

Session Overview: This presentation combines the two previous overviews into one presentation, sharing the best ways to increase your board engagement and relationships while ensuring your board members are getting what they need.

SUCCESSFUL SUCCESSION PLANNING

Session Overview: No matter how much we talk about it, succession planning continues to be a top concern among credit union executives and boards. Why? Let's identify key issues and root causes of the current succession planning crisis. And then let's create an action plan on how to make succession planning happen at your organization.

DEMYSTIFYING DECISION MAKING

Session Overview: At all levels of the organization, decision-making can feel difficult, unclear, and risky. This is particularly true during a time of change and uncertainty, but it doesn't have to be that way. Let's get rid of the mystery around decision-making and clarify how good decisions are made and communicated.

STRATEGY 101

Session Overview: Whether you're brushing up on your strategy skills or learning new techniques, understanding the key elements and approach to strategy will enhance your performance and understanding of your credit union's long-term goals. You will learn – or refresh – the basic building blocks of strategy, understand how to make strategy come alive throughout the year – not just in planning season, and identify key strategy refresh elements that you can apply to your organization or team today!

STRATEGY & CULTURE: THEY'RE BETTER TOGETHER

Session Overview: You've heard "culture eats strategy for dinner" – but did you know that sometimes, they make an excellent date? Learn how your culture and your strategy can complement each other for the betterment of your organization. You will understand how to measure and assess your culture, evaluate if your culture and your strategy are purposefully connected, and determine ways to strengthen the connection between these key organizational forces.

CHANGE MANAGEMENT 101

Session Overview: This course introduces the fundamentals of Organizational Change Management (OCM). Participants will understand the importance of OCM in today's increasingly complex and dynamic environment. Participants will also be exposed to a holistic OCM approach that they can immediately leverage to help drive successful change initiatives at their organizations.

PROJECT MANAGEMENT 101

Session Overview: The primary objective of this training session is to provide participants with a foundational understanding of project management, know the definition of a project and typical phases, and identify the differences between risks and issues. This training session combines theoretical concepts with practical applications through case studies and group discussions, fostering an interactive and engaging learning environment. By the end of the session, participants should be able to comprehend the significance of effective project management and its value in achieving organizational goals.

EFFECTIVE COMMUNICATION & MEETINGS

Session Overview: This training session provides a solid foundation for participants to improve their communication skills and facilitate effective meetings. The objectives of the class will include an understanding of why it is important to communicate effectively and how to apply best practices to deliver effective communication. This session goes beyond theory, providing you with practical communication tools and skills you can implement immediately. Elevate your professional presence, lead impactful meetings, and communicate with confidence.

RUTHLESS PRIORITIZATION

Session Overview: In resource-constrained project environments where everything is a priority, nothing can truly be a priority, projects stall, budgets are exceeded, and organizations don't see the returns they plan for. It's up to leadership to exercise ruthless prioritization and clearly define high-value project focus to the team. Participants will learn how to master prioritization and maximize team resources and efforts.

CONNECTING STRATEGY TO EXECUTION FOR POSITIVE RESULTS

Session Overview: You've got an excellent strategy that you're excited about, but what next? Statistically this is where the ball drops - executives and teams are not sure what to do next or how to proceed. The precarious period between creating your strategy and executing on your strategy takes specific skills, tasks, and focus. Not to mention a solid plan to make sure you have the capacity, resources, and tools to execute against your plan. We will share best practices and real experiences to discuss how to make your strategy come to life through a well-connected project plan.

To learn more, [email us](#) and we will be in touch!