



# Speed Roundtables

Before you start on the topic below, do a quick round of introductions – name, bank, location & title/role.

## Employee Attraction & Retention

- What is your bank doing to recruit and retain talent in the current environment where it can sometimes be difficult to fill positions with qualified workers? Has your bank implemented any new recruiting or retention benefits, and which have been most successful?
- What strategies or resources does your bank offer to help employees map out the future of their career?
- How does your bank handle training and professional development? Do you have development plans, training classes, mentors, etc.? How does your bank keep training a priority while also ensuring it doesn't take away from your daily responsibilities?
- What do your new teller training programs look like? How much time do new tellers spend in training before going to the branch? Do you have one designated trainer, or do you have a team? What do you do for teller incentives and career path preparation?
- Are your banks operating an internship program to create a pipeline of new employees?
- Is your bank focused on Diversity, Equity and Inclusion? What is your bank doing and what options/strategies are you finding successful to create an inclusive environment?
- Open Discussion



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## Self-Improvement

- Are you currently (or recently) involved in any mentorship or leadership development programs – in the bank or outside the bank? How has your involvement been beneficial to you or others that you have worked with?
- What's important to you to make you feel empowered? How do you empower your team members?
- Do you deal with complacency on your team, in your subordinates or even yourself? How do you combat it?
- Are you responsible for setting goals for yourself? How are you held accountable?
- What do you include in your personal "elevator speech?" i.e. What do you say when you are asked "What do you do?"
- What strategies have you found to ensure you maintain a healthy work/life balance?
- Open Discussion



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## The Future of Banking

- Are any banks currently utilizing or planning to incorporate Artificial Intelligence? For example, are you utilizing AI in data analysis, risk analysis or any other ways to enhance customer experiences?
- Is your bank offering a way to purchase or hold cryptocurrency? Are customers asking for this product? Any details on what you are offering and why (or why not) would be helpful to share.
- What strategies does your bank use to develop technology (e.g., in-house development, fintech partnerships, core providers)?
- How do you view the role of private credit in the lending market? Is it here to stay or will it fade away in lower rate environments? Do you view it as a potential threat to replace banks in the lending market?
- What changes have had the biggest impact on your bank (e.g., technology, branch traffic, regulations, competition, customer expectations)? What are some obstacles that you believe will have a significant impact on the future (e.g., new credit score model, change in funding regulations for FHLBI advances, reconsideration of value on real estate appraisals)?
- How have higher rates impacted your bank, from any perspective (lending, deposits, etc.)?
- Open Discussion



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## Leadership and Professional Development

- How are you prioritizing time for personal growth and development (watching/listening to webinars, podcasts, audiobooks, etc.) while managing a team of employees with their own development?
- As a leader, how do you create a detailed strategic plan for your employees? More specifically, how do you provide employees with feedback on areas for improvement and keep record of progress to keep them on track? Do you have a strategic plan for yourself?
- We often have a picture of what leadership looks like, but there are many ways to lead that can differ between people, or even with the same person in different situations. How does your leadership style change from situation to situation?
- Do you or your bank have any best practices for dealing with workplace conflict – between co-workers, customers, etc.?
- We all have grown and learned lessons throughout our careers in banking. What is one revelation you wish you could have learned earlier that would have helped you be a better leader?
- Is your bank seeing increased levels of employee burnout, and how are you dealing with it?
- Open Discussion



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## Workplace Culture

- How would you describe the current culture initiative where you work and what have you come across as far as challenges? Are there any components, rewards or other tangible things in your bank's culture initiative that you feel are beneficial and productive in increasing morale and culture?
- A lot of companies say they want to promote from within, but how do you make sure your people are ready for the next level? How does your bank keep a bench of prospects for possible promotion?
- What does your bank do to get all staff on board for any changes in technology, practices, policies, etc.? How does your bank ensure effective communication?
- Does your bank offer the flexibility of remote work or a hybrid schedule? What are the advantages and disadvantages you have seen with it?
- How does your bank handle paid time off in this environment with remote or hybrid scheduling? What does your bank do if employees exhaust all their paid time off?
- What does your management team skill-building look like? How do you prepare your management team for adequate training of current and new employees in their perspective roles?
- Open Discussion



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## Attracting and Retaining Customers

- What trends are you seeing in fraud? Does your bank have a fraud department, and if so, how are they staffed (e.g. Fraud Department FTEs per million in assets)? How do you train frontline staff to handle such encounters with customers?
- What type of marketing campaigns are local banks doing that get results with so much competition? How do your institutions handle different markets? For example, when certain marketing or other operational functions work in one market but don't transfer well into others, do you pivot?
- How do you discuss ways that your coworkers can have better customer service without seeming like you are correcting them? How do you address issues without seeming like you are criticizing them?
- What strategies for growth and retaining clients are your banks implementing in the current environment? How has your bank worked to enhance the customer experience?
- With funding issues for loans and the cost of new funds via new CDs or borrowing funds, how are banks being impacted by current events?
- Has anyone started digging into the concept or uses for “open banking”? The concept of “open banking” allows for financial data to be shared between banks and third-party service providers.
- Open Discussion