



# HUMAN



# RESOURCES &

# MARKETING

# CONFERENCE



**March 19 & 20**

**Holiday Inn Executive Center**

2200 Interstate 70 Drive SW, Columbia, MO 65203








# AGENDA



## SESSION KEY

-  General Sessions
-  Human Resources
-  Marketing

**Tuesday, March 19**

**8:30 a.m. Registration, Continental Breakfast, Trade Show**

**9 – 10:15 a.m. Welcome & General Session**

**Unleash Unstoppable Momentum™ in Others: Boost Your Team's Connection, Engagement and Resilience Through Heart-Led Leadership**

Kim Becking, Founder, Momentum Motivation

The new world of work is hard, and being a leader in it is even harder. There's more to do, more to overcome and with constant change and 24/7 technology – it NEVER SLOWS DOWN. But even with the increase in connectivity thanks to technology, your teams are experiencing less collaboration and less connection, which is increasing their overwhelm and making change and challenge even harder to overcome. Now more than ever, you'll need to lead heart-first so your team feels valued, seen, heard, appreciated and, yes, loved!

Communication is no longer enough in this overwhelming, rapidly changing world of "so muchness." Your ability to connect deeply is critical to the well-being, morale, engagement and productivity of those you lead. In this engaging, highly tactical session, Kim Becking unveils practical strategies and tools for connecting, engaging and showing up as an empathetic leader so you can boost your team's resilience, improve collaboration, increase retention and engagement, and ROCK any change together.

**10:15 – 10:30 a.m. Refreshment Break**

**10:30 – 11:30 a.m. Breakout Sessions**

**Onboarding Your New Hire: An Experience or An Afterthought?**

Vicki Kraai, Chief Engagement Officer, InterAction Training

Onboarding is the new hire's first impression of your organization. How do you check all of the HR required boxes while providing an experience for your new hire? Learn how to excel at new employee onboarding from a new hire's perspective and discover resources for implementation strategies.

**Digital Strategies and Social for Commercial Deposits**

Ben Pankonin, CEO and Cofounder, Social Assurance

Digital connections can create trust with business owners, but in a world of AI where much of content struggles to be trusted, your bank needs to stand out. In this session, we will look at the ways to create trust with content that builds a human connection and grows your impact and of course improves commercial deposits all helping your sales teams to be more effective.

**11:30 a.m. – 12:15 p.m. Lunch**

**12:15 – 1:15 p.m. Breakout Sessions**

**Employee Benefits for 2024 and Beyond: The 5 "Cs" of Employee Benefits for the Future**

Joe Hennessey, Senior Vice President, AssuredPartners




The balance of cost, communication, compliance, creativity and culture is where success lies for all employee benefit plans. Don't hang your hat on only one; give your employees something they want and value.



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Tuesday, March 19

**Breakout Sessions (do not repeat) – Continued**

### Effective Marketing in a World Drive by Technology and Compliance

Kyle Hershberger, President, CrossFinancial

Nearly every sales, marketing or promotion idea in banking today is influenced by emerging technologies and regulatory compliance. This places specific demands on how advertising, promotions and relationship development activities are deployed by financial institutions. Unifying sales, marketing, technology and compliance requires collaboration. So, what are highly effective banks doing to unify their professional resources? This session examines banking industry examples of how community banks are optimizing their sales and marketing practices by collaborating with project partners in operations, information technology and compliance. The most creative and effective sales and marketing solutions will come from teams that develop an enterprisewide process to develop and execute promotions, campaigns and corporate communications.

**1:15 – 1:30 p.m. Refreshment Break**

**1:30 – 2:30 p.m. Breakout Sessions**

### HR Hot Topics

Karen Shannon, Vice President Business Consulting/CHRO, Ollis/Akers/Arney

Organizations and HR professionals must comply with and stay abreast of ever-changing human resources laws and regulations. Organizations must quickly adapt to current issues and the altering landscape around generative AI, compensation, employer/employee relationships, learning and development, the employee experience, workplace flexibility and more. This session addresses HR hot topics, emerging risk and HR trends for the future.

### The Efficient Marketing Department: Get More Done with the Right Team Structure

Dan Novalis, CEO, 2Novas

Whether you're a \$100 million bank or a \$100 billion bank, it's not always feasible, or advisable, to hire all the skills you need in-house. There are numerous ways to run a marketing department — from fully outsourced to fully in-house, with no technology to heavy automations. Each has pros and cons, which you as a leader will need to balance against your budget and goals. This session examines case studies of how banks of different sizes structure their teams and work with vendors, like tech, data platforms and advertising agencies, and how the approach changes based on your bank's size and geographic footprint. Discover ideas for how to get more done by playing to your banks' strengths and budget restraints.

**2:30 – 3 p.m. Refreshment Break**

**3 – 4 p.m. Differentiating your Bank in the Age of AI**

Dan Novalis, CEO, 2Novas

It's been more than a year since the launch of ChatGPT, but the AI era is only just beginning. This session begins with a discussion around what AI can and can't do and where it's heading into the future. The focus will then shift to more practical in discussing use cases for AI at your bank and the pitfalls. For both bank marketers and HR professionals, AI carries a big risk in making you sound generic. This is already a problem in the community bank industry, where everyone wants to be "trusted and local." Examples will show how you can differentiate your bank with AI — from marketing campaigns to job descriptions and more.



# AGENDA



## Tuesday, March 19

4 – 5 p.m. **Reception**  
*Dinner on Your Own*

## Wednesday, March 20

7 – 8 a.m. **Buffet Breakfast**

8 – 9 a.m. **General Session**

### **Creating a Competitive Culture**

Susie Thompson, Vice President HR/Culture Officer, Wood & Huston Bank

Most of us work in banks that have similar products, services and positions; we may even share similar strategic goals. One thing, though, that can offer a competitive advantage is a unique culture where your employees feel like they get to come to work versus have to come to work. Susie Thompson shares key moments from Wood and Huston Bank's culture journey and important tips for creating an award-winning bank culture that her team has used for the past five years.

9 – 9:15 a.m. **Refreshment Break**

9:15 – 10:15 a.m. **Breakout Session**

### **Lessons From an HR Director's Testimony at Trial**

Ty Ketchum, Partner, Armstrong Teasdale

Have you wondered what it would be like to act out real-life trial experiences about what you did (or didn't do) as an HR? This session will give you a taste of it as attendees learn about the process and gain substantive HR practice pointers.

### **Hit a Home Run with Your Strategic Marketing Plan**

Taylor Thoma, Director of Marketing, forbinfi

Elevate your strategic marketing endeavors to unprecedented heights! This session explores a meticulously crafted step-by-step framework designed to propel your brand to success. This strategic blueprint encompasses the elements to conducting a marketing plan that will allow you to influence ideal business outcomes, create intrigue for your target audience and control the narrative.

10:15 – 10:30 a.m. **Refreshment Break**

10:30 – 11:30 a.m. **General Session**




### **An Inside-Out Approach to Transformation**

April Lewis, President and CEO, A. Lewis Academy Inc.

Let's face it — your team members are stressed. They are tired, and compassion fatigue is real. Whether it's in their work lives or their personal lives, their stress is leading them to burnout, and they need coping skills and strategies to manage their stress levels. April Lewis' Inside-Out Approach to Transformation teaches your team the skills they need to manage their stress levels. Discover how building teams of resilient, mentally tough and motivated individuals enhances communication and engagement.

11:30 a.m. **Adjourn**

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# COMMITTEES



## **HUMAN RESOURCES COMMITTEE**

### **Chairman**

Carrie Bergfield, MA Bank, Macon

### **Vice Chairman**

Brian Cox, The Callaway Bank, Fulton

### **Members**

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Janice Chastine, Wood & Huston Bank, Marshall

Leeanna Delaney Homebank, Palmyra

Rachel Keller, Preferred Bank, Rothville

Shelley Klebba, Legends Bank, Linn

Melody Marcks, Central Bank of Boone County, Columbia

Meredith Osborn, Parkside Financial Bank & Trust, Clayton

Angie Temple, West Plains Bank and Trust Company

Susie Thompson, Wood & Huston Bank Marshall

Kristen Ziegler, The Bank of Missouri, Perryville

### **Next Generation in Banking Board Liaison**

Bridgette Reuther, Community State Bank of Missouri,  
Bowling Green

## **COMMUNICATIONS COMMITTEE**

### **Chairman**

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### **Vice Chairman**

Elizabeth Roby, Regional Missouri Bank, Marceline

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Danielle Gironde, Midwest BankCentre, St. Louis

Jeffrey Jones, The Callaway Bank, Fulton

## **MBA EXECUTIVE COMMITTEE**

### **Chairman**

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### **Chairman-Elect**

David Gohn, West Plains Bank and Trust Company

### **Treasurer**

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Jackson Hataway, Missouri Bankers Association,  
Jefferson City

### **Immediate Past Chairman**

J.R. Buckner, First Federal Bank of Kansas City

# GENERAL INFORMATION

## Who Should Attend

Designed exclusively for bank HR and marketing professionals, MBA's HR and Marketing Conference highlights trends, strategies and challenges in the ever-evolving world of HR and marketing. Gain fresh perspectives and practical knowledge to enhance recruitment and retention initiatives and drive growth, creativity and customer satisfaction.

## Registration Information

Payment by Phone, [mobankers.com](http://mobankers.com) or Invoice Fees

**MBA-Member:** First Registrant - \$425 | Each Additional (per person) - \$390

**Nonmember:** \$1,700

Contact the MBA Education Department for group discount.

The cost of meals included in this registration fee for this conference is \$100. This information is provided for your bank's tax records, in keeping with the IRS 50% deductible provisions under Section 274(n) of the Internal Revenue Code.

\*Fees include meals, reception, refreshment breaks and conference materials. These fees do not include hotel accommodations.

## Cancellations/Refunds

Full refunds will be granted for cancellations received by MBA at least 10 days before the conference date. After that date, an administrative fee of \$10 per canceled registration will be retained. Cancellations will not be accepted five days before the seminar. Substitutions are always permitted.

## Hotel Information

The seminar will be held at the Holiday Inn Executive Center in Columbia. Overnight accommodations are available at the hotel.

Holiday Inn Executive Center  
2200 Interstate 70 Drive SW  
Columbia, MO  
573-445-8531

**Hotel Group Rate of:** \$129 per night

**Cutoff Date For Room Block:** Sunday, February 18, 2024

Be sure to state you are attending the Missouri Bankers Association's Human Resources and Marketing Conference.

Room availability is not guaranteed after the cutoff date, and room rates may revert to the published rate. Early reservations are encouraged!

## Disabilities and Food Restrictions

If you have any disabilities or food restrictions that require special assistance, send a brief message explaining how we may best accommodate your needs to [elawson@mobankers.com](mailto:elawson@mobankers.com) or call 573-636-8151.

## Continuing Education



The Missouri Bankers Association is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have the final authority on the acceptance of individual course for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

## Program Objectives

Designed exclusively for bank HR and marketing professionals, MBA's HR and Marketing Conference highlights trends, strategies and challenges in the ever-evolving world of HR and marketing. Gain fresh perspectives and practical knowledge to enhance recruitment and retention initiatives and drive growth, creativity and customer satisfaction.

## Specialized Knowledge – 9.5 credits

Instructional delivery method: Group-Live



Missouri Bankers Association is recognized by SHRM to offer Professional Development Credits (PDCs) for SHRM-CP® or SHRM-SCP® recertification activities.

This conference has been submitted to HRCI for continuing education credits.

# REGISTRATION FORM

## HUMAN RESOURCES & MARKETING CONFERENCE

March 19 & 20, 2024 – Holiday Inn Executive Center - Columbia

Please PRINT or TYPE below. You may photocopy this form for additional registrants.

Organization Information \_\_\_\_\_

Bank \_\_\_\_\_

Address \_\_\_\_\_ City/State/ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

**Name of Attendee** \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

**Name of Attendee** \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

**Name of Attendee** \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

**Name of Attendee** \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

**Method of Payment** \_\_\_\_\_

First Registrant.....\$425 # \_\_\_\_\_ \$ \_\_\_\_\_

Each additional.....\$390 # \_\_\_\_\_ \$ \_\_\_\_\_

Nonmember.....\$1,700 # \_\_\_\_\_ \$ \_\_\_\_\_

**Total Amount Due** \$ \_\_\_\_\_

*\*Contact the MBA Education Department for group discount.*

*\*Fees include meals, reception, refreshment breaks and conference materials. These fees do not include hotel accommodations.*

Invoice the bank.

Credit Card Payment\* (Please type.)


Exp. Date \_\_\_\_\_


No. \_\_\_\_\_


Type Name \_\_\_\_\_

Signature \_\_\_\_\_

### Three Ways to Register

 573-636-8151

 mobankers.com

 Mail check payable to Missouri Bankers Association and form to:

Missouri Bankers Association  
P.O. Box 57  
Jefferson City, MO 65102