

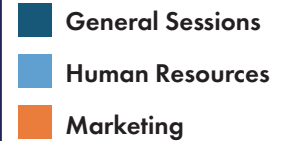
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Human Resources & Marketing Conference

April 9 & 10

Courtyard by Marriot

Columbia



AGENDA

Wednesday, April 9

8:30 a.m. Registration/Continental Breakfast/Trade Show

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



Become a More Influential Leader: Develop a Culture that Engages, Enlightens and Energizes Your Team

Joe Micallef, CEO | Grow UP Sales

Are you an influential leader or simply a task manager? Do you reactively support your team as needed, or do you proactively empower your team to achieve extraordinary success? Bank leaders today are required to be powerful coaches who can engage, enlighten and energize their teams to embrace better approaches to achieving success. But do you know how? As a successful bank leader and coach for more than 25 years, Joe Micallef will share rocket-fueled ideas that will boost your team's performance.

10:15 – 10:30 a.m. Refreshment Break

10:30 – 11:30 a.m. Breakout Sessions (do not repeat)



HR Update & 2025 Cases to Watch

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

2025 is shaping up to be another year of change for organizations and HR professionals. In the ever-shifting world of employment law, the impact of legislative changes can be sudden and unpredictable. Karen Shannon provides an HR update, discusses upcoming changes for employers and reviews U.S. Supreme Court cases from 2024 and cases to watch in 2025.



How Generative AI Can Transform Marketing for Small Teams in Community Banking

Derek Baker, Executive Vice President, Growth and Innovation | Mills Marketing
Kim Schuver, Creative Director | Mills Marketing

This session explores how generative AI like ChatGPT can transform marketing efforts for small teams in community banking. From automating content creation to personalizing customer interactions, generative AI offers powerful tools to streamline processes and enhance productivity, allowing teams to achieve more with fewer resources. This session clarifies the difference between traditional AI and generative AI, highlighting the unique advantages it brings to marketing teams, such as increased efficiency and better customer engagement. Gain practical insights on how to implement generative AI in your marketing efforts, both content and creative, while addressing common concerns, including privacy, quality and licensing issues. By the end of this session, you'll feel confident in your ability to introduce generative AI opportunities to your team. Plus, you'll leave with a set of practical resources and examples to move forward with in your marketing endeavors.



11:30 a.m. – 12:15 p.m. Lunch

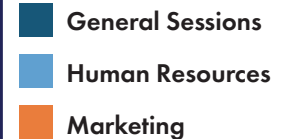
12:15 – 1:15 p.m. Breakout Sessions (do not repeat)



Troublesome Terminations

Monte Mills, Senior Consultant | Safe Haven Security Group

Who hasn't experienced a level of fear during a termination interview? If you haven't yet, you probably will. But what to do about it? How do you keep yourself and your people safe? Learn the top 10 ways to manage a troublesome termination and keep everyone safe.



AGENDA

Wednesday, April 9

Breakout Sessions (do not repeat) – continued



The Next Digital Wave: Evolving Expectations in Retail Banking

Matt Herren, Industry Consultant | CSI

Retail banking has forever changed. It is not enough to just offer innovative products and services – it is critical to explain to consumers how these changes will benefit them while positioning the bank as a partner that can help facilitate. This session discusses the transition to a more customer-centric approach on how emerging financial technology trends will fit into our collective future. The goal is not technology for technology's sake but rather to use technology as the connective tissue that allows institutions to meet customers' ever-changing wants and needs. The rate and pace of change has never been this fast, yet it will never be this slow again. It is imperative that all institutions understand the consumer challenges currently faced in the financial technology world and, more importantly, how the industry is planning to address them.

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

1:30 – 2:30 p.m. **Breakout Sessions (do not repeat)**



Optimize Your Team for Top Performance

Anne Schutt, CFP, Vice President of Business Development | Midwestern Securities Trading Company

Finding and hiring great talent is a challenge for many financial institutions, which makes developing and retaining the team you have a top priority. This session addresses how to create a sustainable, high-performing team with your staff and how to develop thoughtful benefits and compensation strategies aligned with your institution's objectives to help you retain your top talent. If employee acquisition and retention is an issue for your institution, this session is for you.

Breakout Session TBD

2:30 – 3 p.m. **Refreshment Break**

3 – 5 p.m.

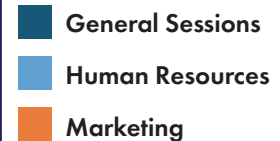
The Solution Room & Reception

Moderated by Joe Micallef, CEO | Grow UP Sales



You have an obstacle, and your peers have a solution! During this networking session, attendees will work with their tables to help find solutions to everyone's obstacles. Please come with one obstacle you would like your peers to assist you with finding a solution!

Dinner on Your Own



AGENDA

Thursday, April 10

7 – 8 a.m. **Buffet Breakfast**

8 – 9 a.m. **General Session**

Power of Pivoting

Monica Ortega, CEO | Pivoting Productions



Change can be scary, but if you learn to do it right, you can find purpose in the pivoting. Too often people use these times of unexpected change to play the comparison game and go through all the “shoulds” and “shouldn’ts” in their lives. These can be two of the worst words in the English language if we don’t learn to step back and evaluate our progress without our emotions attached to it. Examine where your fear comes from and how to overcome it as you explore steps to turn your vision into reality.

9 – 9:15 a.m. **Refreshment Break**

9:15 – 10:15 a.m. **Breakout Sessions (do not repeat)**

What Got You Here Won’t Get You There: Gearing for Growth

Carmen Schwab, Senior Consultant | Haberfeld



In an incredibly competitive environment, we can’t just rely on “the way we’ve always done it.” In fact, some of what we’ve always believed about employees just isn’t true any longer. There are generational differences in what employees want and need from their work. If you want to attract and retain the best talent, now and in the future, you need to understand how they think and what they want.



Crisis Communication

Tim Keck, Consultant | SafeHaven Security Group

You’ve just had a critical incident at your business. Reporters are waiting outside with cameras. Are you ready? There’s a way to make sure you won’t be searching for answers when you find yourself in this position. The 24-hour news cycle means local news organizations are hungrier than ever for fresh content and credible experts. This session will make the case that developing relationships with local media and saying “yes” when they call for your help will pay off for your reputation, your business and your bottom line.

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

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

A.B.C. for Success – How You Can Achieve an Extraordinary Career in Banking

Joe Micallef, CEO | Grow UP Sales



The banking industry offers everyone an opportunity to achieve extraordinary success, but many individuals don’t know how. Joe Micallef shares how he rose from bank teller to bank CEO by adopting three simple principles for success. He explores these principles to guide you in developing a plan to achieve your goals, build greater confidence and overcome the limiting beliefs holding you back. This inspirational session will help you achieve the career, and life, of your dreams.

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



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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 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 conference. Substitutions are always permitted.

Hotel Information

The conference will be held at the Marriott Courtyard in Columbia.
Overnight accommodations are available at the hotel.

Courtyard Columbia

3301 Lemone Industrial Blvd.
Columbia, MO 65201
573-443-8000

Hotel Group Rate of: \$109 per night

Cutoff Date For Room Block: Tuesday, March 18, 2025

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 or call 573-636-8151.

Image Use Policy

Registration or participation by an individual in attending Missouri Bankers Association events and activities constitutes an agreement by the attendee to the MBA's use and distribution, both current and future, of the attendee's name, image or voice in print, media, social media, photographs, videotapes, electronic reproductions, and audiotapes of, or reporting, such events, and activities and promoting MBA activities, services and programs. Attendees waive any right to inspect or approve the finished materials and MBA communications and publications and agree that all such images, pictures, video or audio recordings, and any reproduction thereof, shall remain the property of the MBA to use at its discretion. Consent is binding, perpetual and may not be revoked.



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.

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

This conference has been submitted for SHRM and HRCI credits.



REGISTRATION FORM

Courtyard by Marriot

3301 Lemone Industrial Blvd., Columbia, MO 65201

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 _____ CVV _____


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

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 or call 573-636-8151.