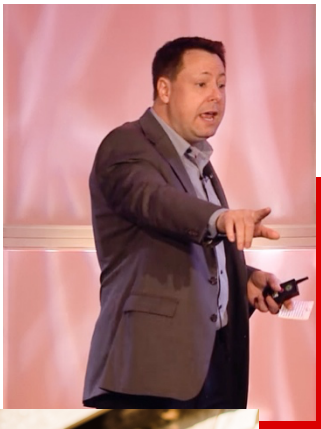
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TEAMResources

Opening Doorways to Your Future





Kevin Smith

2022 Speaker's Packet

Part of the Equation for Creating Successful Financial Institutions

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Biography of **Kevin Smith**



Kevin Smith is a Consultant and Publisher with TEAM Resources. He brings extensive experience in training, designing and implementing professional development resources to nourish the growth of leaders within the credit union industry. Kevin facilitates strategic planning processes, teaches Strategic Governance to Boards of Directors, and oversees the TEAM Resources board self-evaluation programs with credit unions nationwide.

Kevin is co-author of *A Credit Union Guide to Strategic Governance*. This essential book helps Governance teams become as effective as possible. He also writes the monthly TEAM Resources blog that is read by thousands nationally. The monthly blog shares guidance on board topics such as governance, strategy and issues related to the supervisory committee.

Previously, Kevin spent 10 years at the Credit Union National Association (CUNA), in the Center for Professional Development as Director of Volunteer Education. In that role Kevin developed and oversaw programs for credit union executives, boards, and volunteers. This included conferences and training events, webinars, print programs, and online courses, among others. During his tenure at CUNA, he created and brought several new programs to the credit union movement. One of these is the CUNA Volunteer Certification Program, an intensive, competency-based program for boards and supervisory committees, offered as a five-day onsite event or as a self-study program, both involving rigorous testing for completion. He also created the CUNA Training On Demand series of downloadable training courses, and the CUNA Pressing Economic Issues series featuring the CUNA economists.

Behind the scenes Kevin was involved with a team of CUNA leaders focused on creating a culture of innovation within the trade association, and working toward keeping the organization forward-thinking, to create new and better programs for its membership. This included participation in an IDEO design program.

Before joining CUNA, Kevin spent several years teaching at the University of Wisconsin-Whitewater.

He holds a Master's degree from DePaul University, Chicago and a Bachelor's degree from Miami University, Oxford, OH.

About TEAM Resources:

Team Resources is dedicated to providing strategic planning, training and consulting for banks, credit unions and other financial institutions nationwide. We also produce the Lenders Tax Analyzer© software, a simple and powerful tool used by thousands of loan officers to help them understand borrowers' tax returns.
http://www.forteamresources.com

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Testimonials:

"He is a genius and I could listen to him all day. I wish he could be my children's teacher, but I'm glad he's ours.
I'm not the biggest fan of Zoom and always prefer in person classes, however with Kevin it doesn't matter. It's the same high quality, interesting, engaging type of class.
We are very lucky to have him."

- Executive Training Program attendee

"Kevin Smith is a ball of energy and a very engaging speaker."

- MS CU League event attendee

"I must commend you. I was highly impressed with your ability to adjust to the level of your audience. You didn't miss a beat. Well done! You did help us focus and refine!!"

- Cheryl Eveatt, CEO Castparts CU

"…talented in your ability to deliver information in an easy to understand way that allows the listener to put your practices into action."

- Angela Daily, California Credit Union League

"Easy to Understand, personable, good listener."

- Team Development Session Attendee

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Topics:

Credit Unions and the Infinite Game



Credit union friends: Are you playing to win? You shouldn't be.

That got your attention didn't it? That you *shouldn't* be playing to win. Here's the central issue: What game are you trying to "win"? And what does it mean to "win"?

Simon Sinek's latest book, *The Infinite Game* is tailor-made for the credit union industry.

Too many people, particularly in corporations are playing finite games and playing to "win." They're doing this in a way that makes leaders do things that jeopardize the bigger picture health of their organizations.

Simon Sinek asks us to consider, is the flipping of this mindset, and to think about playing an "Infinite Game," where there is nothing to "win." The goal is to keep playing; to identify a just cause worth working toward, one that ultimately cannot be achieved.

In this session we'll explore how this applies to all credit union people: from volunteers to MSRs. Presenter Kevin Smith will explore how this flipped mindset works in lockstep with credit union principles and philosophy that is in our DNA and will help credit unions thrive for all of the tomorrows.

We'll talk about:

- What it means to have a Just Cause and what elements make that;
- The five elements of the Infinite mindset;
- How this thinking works for credit unions and sets us not just apart but above the competition; and more…

Audience: directors, volunteers, supervisory committee members, CEOs, all staff

Transforming Governance Amidst Crisis: Embracing Post-Pandemic Digital Thinking



Your members have gone digital and your branches have gone digital. Heck, it's fair to say that even your board meetings have gone digital as well … but has the board's thinking, its governance approach, its approach to strategy transformed? Don't let that be the last holdout or sticking point. Everything has changed and there is no going "back to normal." In this session Kevin Smith will help you embrace the recent challenges and use them to pivot and slingshot board governance thinking to a new level.

You'll discuss:

- Digital boards: meetings & thinking
- Rethinking the community presence of the credit union beyond branches
- New models of member experience and the impact on staff
- Digital governance as flow, not episodes
- Impacts on board turnover and succession

Credit union board members have the opportunity to help members and communities at levels not previously considered and at the speed of the 21st Century if they can embrace the circumstances and adapt.

Audience: directors, volunteers, supervisory committee members, CEOs

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Boards Behaving Badly: The Guide to Handling Unruly Directors



We've heard the stories, or experienced firsthand ourselves – yes – distracting or unruly directors. They come in many forms and in some familiar stereotypes. Find out how you can manage unruly director behavior and keep your board on track to provide peak strategic value. This task belongs to every member of the board, not just to the board chair. Starting with good governance practices you can arm yourself with tools for:

- Having difficult conversations;
- Holding directors accountable;
- Creating an innovative and dynamic board culture;
- Maximizing teamwork and rapport;
- Preventing distractions and rambling board meetings;
- And much more…

Audience: directors, volunteers, supervisory committee members, CEOs

Teams, Trust & Performance: Creating A Dynamic & Fearless Environment

Forget trust falls, ropes courses and building towers from straws and tape. Team coherence is more important than ever, but you need to rethink how to get there if you want teams that will innovate, create and disrupt at the pace of the 21st century. Find out what Google and others researched and have found to be the most important elements for team strength that yields productivity and results: an environment free of fear, with increased dependability, structure/clarity, impact, and meaning.

Audience: any

Board Governance and Credit Union Liquidity Risk Management



One of the trickiest roles for the modern credit union board is in the area of liquidity risk management. On one hand the board has fiduciary duty of overseeing all things in operations, on the other, directors typically don't have the level of expertise needed to be heavily involved with the complexities of managing liquidity. In this session you will learn a strategic governance perspective to liquidity oversight, how to make sure that your executives handling the nitty gritty complexity of the liquidity needs of the credit union are in line with the board's strategic vision for the direction of the organization, and the safety and soundness requirements that the regulators require. You will hear how to set up a system that establishes oversight reporting, monitoring systems and communication of risk tolerance. Board members can use these systems to keep themselves out of the weeds, and from being too focused on individual ratios, and instead maintaining focus on the big picture.

Audience: directors, volunteers, supervisory committee members, CEOs

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Guidelines for the Effective Board Chair



As a director among equals, the board chair has a difficult path to navigate. On one hand you have leadership responsibilities; on another you have a vote and voice the same as your peers. Stripped down, the chair is the "gatekeeper," "peacekeeper," and "timekeeper." But there's so much you can do to maximize your impact on the board – and therefore – the board's impact on the credit union and its members. Find out what you can do to provide maximum value in this role, using good strategic governance practices as your compass.

Audience: board chairs, aspiring chairpersons, directors, supervisory committee members, CEOs

The Board's Guide to the Balanced Score Card Approach to CEO Oversight



Gone are the days of an "annual" review for the CEO. Once a year just doesn't cut it; it's not fair to a CEO; it doesn't provide time to give context or to "right the ship." CEOs want regular, ongoing feedback to make sure the operations of the CU are in line with the vision of the board. This is all increasingly complex. The balanced scorecard can help you, as directors, to provide great guidance and will provide you great feedback and information for your oversight role. Good news, right? The bad news … there's no one scorecard that is a perfect fit for credit unions. You must customize this using your values and goals to make it work. Kevin will provide you with the tool and options you need to assemble a balanced scorecard that works for you.

In this session, you'll learn how to:

- Organize your values for a scorecard
- Choose the factors that are most relevant
- Prioritize your options
- Weigh and balances your goals
- Discriminate between subjective and objective elements

Audience: directors, volunteers, supervisory committee members, CEOs

Board Governance Essentials: Becoming a Better Board Member

A board member's duties can seem overwhelming and far reaching. This course illumines the fundamental duties of a board and the best ways to discharge them. It will cover functions that boards often become involved in that have little benefit, or a negative impact on the credit union, and how to focus on those things that will be the most beneficial. We will also cover ideas on what very effective boards do to make the best use of their time and guide their credit union to become the best for the membership.

Audience: directors, volunteers, supervisory committee members, CEOs

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The Board Calibration Process: Alignment for Higher Performance
(Or: Alignment is Not Just for Tires)

Credit union boards spend plenty of time in discussion and debate. It's familiar territory. But what if the board could go through a regular alignment process that would reduce friction, increase performance and create a more efficient group? Through the calibration process, boards can quickly and easily map out where members are in relation to each other on critical issues of governance and oversight, then have calculated conversations make sure that everyone has the same vision and direction for the organization.

In this session you will:

- Learn three evaluation approaches for creating alignment;
- Review common obstacles to alignment & methods for avoiding them; and
- Discuss best practices for alignment maintenance.

Audience: directors, volunteers, supervisory committee members, CEOs

Best Practices of the Modern Credit Union Board

Of course, every board is different. We're talking about humans after all. But there are reliable & researched "rules of thumb" that raise the performance of boards. Hear about practices that are tried and proven across a variety of board sizes and types. Make sure that you're working smart and efficiently for your members and for the credit union.

Audience: directors, volunteers, supervisory committee members, CEOs, senior management

Supercharging the Board Team *
(Or, Just Who are Those People in the Board Room with Me?)

Just how well do you know your colleagues in the boardroom? Sure you know their kids' names and golf handicap, but how well do you know their working style. After all, you may be volunteers, but what you do in the boardroom is work. Organizations often recognize the need for deliberate team development at the staff level but ignore it at the top. In this session we will use the WorkPlace Big 5 model to consider how your team's personalities line up in a way that you can use to get higher performance. Find out where your colleagues get their energy, and where they become drained; who needs reflection before a decision, and who needs to "talk it through."

In this session you will:

- Consider regular development of the board as team;
- Learn the fundamentals of the WorkPlace Big 5 model; and
- Discuss options for capitalizing on the variety of personalities on the board.

Audience: directors, volunteers, supervisory committee members, CEOs

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Supercharging the Team*
(Or, Just Who are Those People in the Room with Me?)

Just how well do you know your colleagues? Sure, you know their kids' names and golf handicap, but how well do you know their working style. Organizations often recognize the need for deliberate team development at the staff level but ignore it at the top. In this session we will use the WorkPlace Big 5 model to consider how your team's personalities line up in a way that you can use to get higher performance. Find out where your colleagues get their energy, and where they become drained; who needs reflection before a decision, and who needs to "talk it through."

In this session you will:

- Consider regular development of any team;
- Learn the fundamentals of the WorkPlace Big 5 model; and
- Discuss options for capitalizing on the variety of personalities in any working group.

Audience: any

**Supercharging the Team* sessions listed above can be presented in a variety of formats, keynote, breakout, as well as extended development sessions/programs. Longer sessions incorporate the full WorkPlace Big Five assessments and reports and have a separate pricing model. Extended sessions are perfect for team building and professional development programs.

Governance at the Speed of the 21st Century

In an age of Instagram, TicTok, instant messaging, and on-demand everything, the work of the board of directors typically plods along at the speed of the steam locomotive. It's time that we say "What if?" What if … the board's role could be reframed and re-conceptualized to create dynamic movement in the organization? What if … the board could effectively work at the pace of the modern world without spending any more time than they already do, or maybe even less? You know … work smarter, not harder. It's possible. This is not a technology problem, though it involves technology. This is not a theoretical problem, though it involves theory. Hear how you can take on the mantle of leadership for your organization, and set the strategy, as you should, in a more efficient way that matches the pace of the world … to the ultimate benefit of your members.

Audience: directors, volunteers, supervisory committee members, CEOs, senior management

Board Succession Planning at its Simplest and Finest

Is your board ready to move forward into the future? Beyond a year at a time? A well thought out succession plan is a necessary part of the plan. It needn't be complicated or difficult either. Hear how to break this process down into concrete steps: define the competency needs of the board, outline the ideal diversity plan, create a flexible timeline, and start an evergreen recruitment process. This will establish continuity and avoid emergency circumstances.

Audience: directors, volunteers, supervisory committee members, CEOs

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Everything I Needed to Know About Teamwork & Leadership I Learned in Marching Band

Over 125 people step onto a field in unison, then start playing different parts and moving in different directions. They're executing a strategic plan to a grand, explosive visual and auditory effect. That's a team working with great leadership.

We all love a great sports analogy, but in terms of leadership and team development, the marching band offers all lessons: mentorship, succession planning, diversity of roles, execution in synchrony, communication, competition, and more! And they are working together with purpose. And c'mon, a basketball team has, what, 10 people? Only half of which are playing at the same time.

This session offers the insights of a self-proclaimed "band geek." Lighthearted though it may be, the lessons are real, and inspiring.

Audience: directors, volunteers, supervisory committee members, CEOs, senior management, staff

The Power of Rapport and Influence

How do you think of *rapport*? For many it's a vague "connection" with others, or a mysterious "feeling" in a group dynamic. The truth is that rapport is much more powerful than most realize. (Did you know that it will show up on an MRI?) Knowing and understanding this powerful force can help you influence a single person or an entire room full. But rapport can also be the lynchpin in creating an effective team, the difference between simply moving projects forward, and charging ahead with gangbuster success. In this session, we'll discuss the science behind rapport, and practical ways to harness it in every aspect of daily life.

Audience: any

The Path to Presenter

Fear of public speaking is right up there with fear of heights and fear of snakes. But we all have to do it some of the time. With a little practice and a few tips, a well-delivered presentation could be the difference between a big project going forward, a major deal getting closed, or even a significant promotion. Sharpen your skills and leverage them for the good of your organization and your career. This course will cover research-based approaches to help you establish credibility and rapport with any audience. It will provide guidance on the use of graphics and how to *avoid* creating PowerPoint presentations that cure insomnia.

Audience: This course is targeted for novice to mid-level performers, ideal for younger developing staff, or those who are, or hope to change rolls and grow professionally.

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