

# The path to leadership



begins right here.

*An intensive, 18-month program  
guaranteed to motivate and  
accelerate the development of leaders  
of the Texas banking industry*





## Program Overview

The Texas Bankers Association Management Development Program is a leadership development program designed to actively enhance the leadership, organizational and performance skills of highly motivated mid-to-upper-level bankers.

This series of five sessions is designed to be intense, demanding, and pragmatic. Ambition is a requisite for this series. So are courage, a competitive attitude, and a collaborative spirit. The program focuses on developing a solid understanding of the industry and the skills necessary to lead banks and communities into the future. The faculty is the best in the business.

## Program Outcomes

- Provides thorough understanding of banking
- Generates motivation and commitment to your career
- Develops leadership & organizational skills
- Creates a peer banker network
- Prepares future banking leaders

*“MDP is more than team building — it is self-definition.*

*I cannot believe the impact this class had on my life. I had no idea there was a strong leader inside of me.”*

*— Samantha Edsel, Grandview Bank*

*“It is truly a transformation process to becoming an effective leader. I recommend that each of our banks send someone to each class to build a stronger organization.”*

*— L.V. Coffee, First Financial Bank, Eastland*

### Session I

## Foundations of Leadership

April 26-28, 2009

The first of the five sessions establishes a foundation from which to develop new skill sets.

#### Session Topics:

- Presentation Skills
- Emotional Intelligence
- Elements of Leadership
- Team Building

**Presentation skills.** Few skills better serve a manager/leader than the ability to communicate with brevity and clarity. A short classroom introduction to speaking will be followed by several speaking sessions after which each attendee will receive a personal critique.

**Emotional Intelligence (EI).** Approximately 75% of our personal success is derived from emotional intelligence while up to 40% of human productivity is driven by EI.

You will hear about the Warren Paradox (soft skills are hard skills) and learn how to take what you are taught in this session and apply it to your work and life.

**Elements of Leadership.** This introduction to traits of great leaders is less about theory and all about application. This session begins the attendee’s immersion into pragmatic leadership principles that make a difference and can be immediately used.

**Team Building.** Teams are formed in a myriad of ways and for different purposes. The productivity of teams is driven by sound principles related to size, organization, mission, collaboration and leadership. The team concepts are built from the experiences of one of the top team-based organizations in the world — the United States Navy SEALs.

### Session II

## Walking the Talk

September 27-29, 2009

#### Session Topics:

- The Art of Organizational Communication
- Crisis Communications
- Leadership in Crisis
- Presentation Skills
- Team Building

**The Art of Organizational Communication.** The quality of corporate culture is driven by language and dialogue. This session offers ways to analyze your people and your organization, and ways to develop responses that make both operate at a higher level of efficiency. Experiential exercises reinforce the basic concepts.

**Leadership in Crisis.** Leadership is never more important than when things are bad. This session proves the old saying, “In crisis, intuition is almost always wrong.” An outline of how to engage a crisis, when and how to respond to various publics, and the pitfalls of doing the obvious will prepare attendees for worst case scenarios.



**Crisis Communication.** One of the most popular sessions places attendees in a crisis situation using actual bank-related case studies. Crisis teams are formed that must plan a response and deliver it to the class, which plays the roles of customers, shareholders, relatives of those in the case study, and media. It is a dynamic exercise that helps develop essential skills in the safety of the class environment.

**Presentation Skills.** Attendees continue to develop their presentation skills with increased emphasis on conversational and small group techniques. The mantra is: Every conversation is a presentation.

**Team Building.** Teams compete in experiential exercises to further develop communication, collaboration and leadership skills.

## Session III

# Looking Inward: Practical Applications of Leadership

January 24-26, 2010

### Session Topics:

- Peer to Peer Education
- Conflict Management
- Project Management
- Team Building
- Presentation Skills

**Peer to Peer Education.** This section has two parts. First, attendees assigned core management/leadership topics begin offering their views of how to migrate concepts to the workplace in a series of presentations that center on practical application of what is learned. The mantra here is: Knowledge without application is worthless. Second, attendees work on their problem-solving skills using peer interaction.

**Conflict Management.** Core pragmatic concepts are presented that hone skills needed to manage conflict situations. Using skills learned in the peer to peer education, attendees break down conflict into parts including cause, roles of personalities, positions, and peer pressure.

**Project Management.** Methods of managing projects are presented and practical principles are introduced including the Braeses Paradox and the Zone of Doubt and Blame.

**Team Building.** The process of building and managing teams is used to develop skills associated with project management. Experiential exercises reinforce the knowledge.

**Presentation Skills.** Attendees continue to receive individual training and feedback on these necessary skills.

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*“Not your typical classroom setting. The physical team challenges allow everyone an opportunity to apply and test the course curriculum.”*

— Ben Cowan, Vintage Bank

*“We have seen a tremendous change in our once quiet and reserved young officer; to one that takes charge, speaks to groups of employees confidently and has great ideas for improvement of employee morale and customer service. We are very pleased with the results and highly recommend this program as a tool to develop and instill confidence in new community bank officers and managers.”*

— Sharon Burran, President / COO,  
Woodhaven National Bank, Fort Worth

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## Session IV

# Looking Outward: Practical Applications of Leadership

May 16-18, 2010

### Session Topics:

- Branding and Marketing
- Media Relations

**Branding and Marketing.** The meaning of brand and how to establish a brand for the bank is presented with a myriad of examples. Teams will create a bank and devise a brand strategy.

**Media Relations.** The basic principles of leveraging the media for positive coverage is delivered in a dynamic session that delivers the goods.

## Session V

# The Business of Banking

September 12-14, 2010

### Session Topics:

- History of Banking and Banking Regulation
- The Legislative Process
- Communicating with the Regulators
- Strategic Planning
- Best Practices of High Performing Banks
- Graduation

This interactive session exposes participants to an overview of past and present banking legislation, with an emphasis on current state and federal issues. The role of the political action committee in elections will be explored. Additionally, representatives from the regulatory agencies will guide the class through the regulatory exam process and give their views of the banking industry.

This session covers the gamut of bank financial information necessary to its successful functioning. Important financial performance ratios are explained and brought into perspective. Always woven into the program is the relevance of leadership competencies.

**Strategic Planning.** Rarely are strategic planning sessions strategic. This session examines frequent pitfalls within the planning process and offers ideas for improvement.

**Graduation.** Attendees will graduate from the program by providing farewell speeches to fellow classmates, followed by a graduation event.

# Application Process

Enrollment is limited to 25.

We ask that participants:

- have a minimum of five years of banking or equivalent experience;
- be nominated by a member of the bank's senior management team;
- maintain current bank membership in TBA.

Applicants must submit a completed application and a letter of recommendation from their bank. Application deadline is February 20, 2009. Candidates will be selected by a committee of bankers comprising the TBA Management Development Program Committee. Participants will be notified no later than March 16, 2009, of their status.

## Program Fee and Educational Discounts

The fee for the Management Development Program is \$4,500 payable before the April session. Fees cover instruction and all meals provided during each of the five sessions. Travel and accommodation costs are not included. TBA will make every effort to keep participant costs down. Most program sessions will begin on Sunday afternoon and end by noon on Tuesday, keeping the time out of the bank to a minimum.

Attendance at all five sessions is required for graduation. Attendance of at least one TBA Annual Convention is recommended. Convention registrations will be discounted by 50% for program participants.

Additionally, the following programs are recommended to participants based on their experience level and educational needs. A 50% discount on fees will be extended to all participants for any TBA educational event while in the program. Attendance at the Senior Management Summit and the Austin or Washington Blitz is strongly recommended.

- Senior Management Summit (July)
- Technology & Operations Conference (February)
- CFO Conference (June)
- Human Resources & Training Conference (August)
- Branch Manager School (October)
- Compliance Management School (May)
- Bond Math University (October)
- Austin Blitz (February, odd years)
- Washington Blitz (February, even years)



## Faculty

The core faculty consists of three talented and specialized presenters representing the best in each of their areas of expertise. Guest presenters will join the program for one session. The three main instructors are:

### Ty Warren



Ty Warren, author, lecturer and consultant, is president and CEO of Saviuum, LLC, a consulting and training company with an international client list. Saviuum's corporate mission is to maximize organizational achievement through peak personal performance.

He is a frequent speaker at bank meetings as well as a consultant to the financial services industry.

His expertise in management, leadership, organizational communication, branding, marketing, and human resources has been used by companies in 50 states and seven foreign countries.

He recently was named National Speaker of the Year by the collegiate debate honorary society, and was the closing keynote speaker at the International Leadership Conference held in Paris, France. He was named International Distinguished Speaker by the Global Business Consortium, and has given seminars in Italy, Belgium, France, and Trinidad.

### Juli Lynch, Ph.D.



Juli brings a balanced approach to individual and professional development. She considers her clients in terms of their communication and leadership abilities.

Juli's programs are inspirational and highly motivating. Her stories from the Discovery Channel Eco-Challenge are not to be missed. Nor is her clear framework for helping every single person take steps to become better, stronger, smarter and more confident.

As the lone female on a team of Navy Seals in the Raid Gallouise and the Eco-Challenge, she endured mind-numbing endurance races across hundreds of miles of brutal terrain that helped shape Lynch's core value system.

Armed with a Ph.D. in organizational communication, and with 10 years of consulting experience behind her, Lynch comes fully equipped to give you perspective on your practices.

### Steve Ahlberg



Steve Ahlberg understands the reality of facing long odds and devising methods for managing them. That's one thing a career spent in the U.S. Navy has empowered Steve to do: think thoroughly and strategically. In large part, Ahlberg's core

value system took shape during his time as a SEAL and a SEAL Team leader. The SEALs are arguably the most versatile of the military special operations' groups. It is their job to handle the world's most demanding missions with precision.

Ahlberg was a founding consultant with Extreme Arts & Sciences and remains unquenchingly popular because of his ability to wind stories of his military exploits around effective methods of business communication, team leadership and executive training.

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*I would recommend this life-changing program to anyone who wants to hone their leadership skills.*

— Debra L. Hopkins, The San Angelo Banking Center



List All Banking Schools You Have Attended:

List Several Community Programs You Are Involved In:

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What do you expect to gain from participating in the TBA Management Development Program and how do you anticipate using what you will learn, both in your bank and personally? (Attach additional page(s) if needed.)

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Applicant's Signature

Date

Recommending Officer's/Director's Signature

Recommending Officer's/Director's Title

### Instructions:

The application form must be completed in full with signatures of applicant and recommending officer. A letter of recommendation from bank's senior management or director must be attached to application. **Application must be received by February 20, 2009. Do not send any money at this time.** Participants will be invoiced upon acceptance into the Texas Bankers Association Management Development Program. **Mail to:** Texas Bankers Association, 203 W. 10th St, Austin, Texas 78701.

### Additional Questions: (Attach additional page(s) if needed.)

What do you bring to banking that is different or unique or what are your personal goals?

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What is a concern for the future of banking?

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What are the traits of an effective leader?

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What are you uniquely doing in your bank?

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Are you aware of the time commitment and financial commitment of the leadership program?

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