



ABA STONIER GRADUATE SCHOOL OF BANKING

2025 COURSE CATALOG

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Year 1 Core Course Descriptions

Asset/Liability Management (ALM)

The Asset/Liability Management course is a core subject in Stonier's first year program. This course is designed to provide a firm foundation for Year 1 coursework and progress through the ABA Stonier Graduate School of Banking as a three-part series.

Bank Financial Analysis

The Bank Financial Analysis course is a series which examines the factors that influence a bank's financial performance including balance sheet growth and composition, net interest margin, efficiency, liquidity and loan equity. This course covers the following topics:

- Bank performance analysis
- Capital management
- Value at risk
- Non-deposit products
- Corporate governance

Building Trusting Teams

In this first-year wrap-up, we will focus on what makes up a trustworthy team. We will analyze what roles we each play in building a trusting team, and how we prefer to build trust. We will practice trust building tools to take back to work.

Business Analytics

This session discusses the use of data and analytics to drive strategy and innovation across the modern organization. Participants will hone their skills in making well-informed decisions related to the opportunities and challenges of data analytics and AI in today's business environment.

Capital Planning

This course will explore issues relating to the optimal use of capital, and why it's key to becoming a high-performing bank. Discussion will include the strategic factors of capital formation, the effect of capital on various areas of the balance sheet, shareholder value and the external effects of capital management.

Economic Update*

This course covers the current economic and financial outlook for the U.S. economy. Participants will examine where we stand after the financial crisis, what can bring about robust job growth, and whether our federal spending plans are sustainable, even in the short run.

As of March 2025

**Courses taken by first-year Accelerated students*

Engagement That Works: Building a Corporate Culture for Success

This course provides a practical, six-step blueprint for creating a culture that fosters commitment, collaboration, and long-term success. You'll learn how to cultivate an environment where employees feel valued, motivated, and aligned with your bank's mission—leading to better retention, improved customer service, and a stronger bottom line.

Enterprise Risk Management

While enterprise risk management (ERM) programs have a great deal of potential, traditional ERM approaches often struggle to generate sufficient buy-in from internal stakeholders. This course will respond to this challenge with a value-based ERM approach that transforms ERM into a strategic management process, better for decision making.

Specifically, this course covers:

- Criteria for evaluating an ERM program
- Techniques to avoid common risk identification mistakes
- How to quantify all types of risk, and clearly define risk appetite
- Using ERM to correct a flaw in balanced scorecards

Managing and Measuring Performance

In this session, we will consider how to measure, manage and improve the performance of employees. The discussion includes how to handle problem employees, how to manage the performance appraisal process and the alternative approaches many companies now use to provide a more continuous, feedback-rich alternative.

Marketing Strategy

Strategic marketing translates your bank's business objectives into effective, actionable steps. It also helps you make better decisions about your bank's customers, products, business lines and bank services. Marketing should always blend creative thinking and execution with research, strategy, technology and analysis to achieve organizational goals. In this session, learn to harness your bank's brand, target the right audience, identify key performance indicators, understand AI automation and more.

Operational Risk

This course focuses on operational risk, trends and cybersecurity.

Payments Overview

Get acquainted with the various U.S. payment systems by taking a walk through the primary payments channels used by businesses and consumers. We'll define key terms, review the economics of each type, and the primary use cases for the five key payment channels. You'll also discover future payment trends, fintech disruptors, digital wallets and faster payments.

As of March 2025

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Technology and Innovation

This course will broadly explore innovation with an eye toward mandates for advancement, and mandates for transformational talent.

Wharton Leadership Journey

In today's business landscape, exceptional team leadership is imperative for sustainable success. This highly immersive experience serves as the foundation in our Year 1 program and provides profound insights into the intricate dynamics of leadership, followership, decision-making and team behaviors in challenging environments. This session will enable you as a leader and team member to translate organizational strategy into execution by building trust, resolving conflicts constructively ensuring psychological safety and fostering joint accountability. Through assessments, exercises and interaction, the session includes various components:

- Leading with Awareness: Peer Coaching Essentials and Assessment Debrief*
- Mount Everest Case Study: Team Building
- Leadership Communication: Igniting Action Through Impactful Messaging with Communications Assessment
- Leadership Maps: A Leader's Guide to Prioritizing for Impact
- Social Influence and Questions: Mastering the Science of Social Influence
- Driving Change: Leading Transformational Change

Year 2 Core Course Descriptions

ABA Bank Exec™ Simulation*

The ABA BankExec™ course combines training in financial management and economic analysis in the context of an innovative computer simulation. The exercise encompasses lessons on strategic management, team management and bank management in addition to financial challenges. This dynamic simulation focuses on bank management from a balance-sheet perspective and clarifies how the balance sheet drives the income statement. Students participate in teams, analyzing the condition of their banks, making key managerial and pricing decisions and learning how their decisions affect the performance and risk profile of their banks.

Introduction to Writing Your Capstone*

All Stonier students undertake a Capstone project before returning for their third year. The Capstone is the culminating component of the Stonier experience and often has a career-changing impact. The Capstone requirements are slightly different depending on the type of organization where students are employed. The three options include:

1. Banker Capstone
2. Regulatory Capstone
3. Bank Services Capstone

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All three Capstone options require a written final report as well as a face-to-face presentation to fellow students and a senior industry advisor. All students complete a course during Year 2 that helps them plan and begin writing their Capstone. This course helps the student develop a strategy for completing their Capstone efficiently and sharpen their business writing skills. In addition, students work with a Capstone advisor who guides them through the Capstone process and evaluates the final product. Capstone advisors are all senior banking industry professionals.

Financial Management

Students select the Basic or Advanced Course.

Financial Management (Basic)

The basic course in financial management is aimed at students with no prior exposure to finance. The course covers the theory and practice of corporate finance with an emphasis on the practice. The course focuses on capital budgeting, financial statement analysis and forecasting; the evaluation of capital investments under uncertainty; and estimating the cost of capital. The goal of the course is to provide a set of quantitative tools that you can use to make decisions on where your firm should invest its capital.

Financial Management (Advanced)

The advanced course in financial management is intended for those students with some experience in valuation and discounted cash flow techniques as well as financial management. The course covers the basics of firm valuation. We use classroom examples to estimate a firm's cost of capital, cash flow and terminal value. The course encourages students to apply these concepts to find a market value (price) for a firm.

Wharton Leadership: Corporate Culture

Corporate culture guides leaders' decisions, employees' behaviors and affects how the firm is perceived by its stakeholders. In this session, learn how to identify the key attributes of an organization's business culture and dive into the latest research on how such attributes affect strategic management, employee motivation and organizational performance. Discuss how to navigate contemporary challenges to organizational culture, such as managing culture in hybrid work environments, and protecting culture during periods of growth and instability. Finally, review strategies for changing problematic aspects of culture, including enhanced transparency and aligned metrics as nudges toward aspirational organizational values.

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Wharton Leadership: Resilience and Optimism – Strategies for Navigating Adversity and Enhancing Well-Being

In this session, learn about the factors that enable people to navigate adversity and thrive. Discover the many scientific benefits of optimism on productivity, well-being and health, and practice a skill to enhance optimism. Learn to develop a gratitude practice on health, sleep and workplace productivity, and practice a gratitude intervention.

Strategic Decision Making

This session addresses a range of topics in managerial decision making and judgement, especially when faced with uncertainty. It explains systematic mistakes and specific behaviors, including the escalation of commitment, overconfidence and scarcity authority. It also reminds the participants to understand the effects of emotions on decision making. Throughout the session, participants engage in a series of experiential exercises and are encouraged to ask questions.

Electives

Year 2 students have a choice of four elective courses. (See Elective Course Descriptions at the end of this catalog.)

Year 3 Core Course Descriptions

Authentic Leadership

A key tenet within leadership development is to embrace situational leadership – adapting your style to the needs of your people and the requirements of distinct situations. However, a seemingly opposite tenet emphasizes the importance of authenticity for success in leadership. How do we balance these two oppositional leadership principles? Learn how in this session by analyzing real-world examples, engaging in peer coaching and more.

Business Strategy

Using a customer-centric approach, this course provides an overview of bank strategic planning and value creation. Discussion will cover real strategies in a case study, giving attendees action-oriented concepts to apply at their banks. Students will learn how to interpret a bank's strategy by analyzing its publicly available information. The course covers the use of capital markets, seven ways to build value, de novo branching, product differentiation and use of leverage.

Capstone Project Presentations

Students participate in the Capstone project which gives them an opportunity to apply new skills and knowledge to a “real life” initiative within their organization. During the school session, students present their Capstone project to a team of peers and a Capstone facilitator. They receive constructive feedback on their individual presentations from their peers and advisor and provide constructive feedback in response to their peers' presentations.

As of March 2025

**Courses taken by first-year Accelerated students*

Economic Update

This course covers the current economic and financial outlook for the U.S. economy. Participants will examine where we stand after the financial crisis, what can bring about robust job growth, and whether our federal spending plans are sustainable, even in the short run.

Ethics in Financial Services

This course addresses just how often we all face ethical dilemmas: decisions that are probably encountered on an almost daily basis. In this course, both theoretical principles and real-life examples are used to identify ethical situations that both employers and employees encounter. The course also examines reasons that psychologists think form the basis of differing ethical standards among both individuals and businesses, and the challenges of developing an appropriate ethical work environment in this difficult economic time.

Emotional Intelligence

Emotions are information. This session explores the importance of understanding and using emotions in ways that enhance interpersonal communication, foster satisfying relationships and result in greater productivity. Many people have been conditioned to believe that emotions are not welcome or useful in the workplace. The problem with this approach is that we are, by our very nature, emotional beings. Learn how to embrace those emotions, understand how they work and become better prepared to use them productively.

Leadership Development

This session lays the groundwork for students to integrate their entire Stonier experience of developing a personal network, leadership learning, crafting and presenting successful capstone projects and engaging in a mentor relationship. Through an assessment and inventory, students will be able to better plan how to leverage their Stonier experience that will enable them to build upon their “reflection muscle” to seek ways to put into practice plans that are tailored to their unique style, and priorities.

Wharton Leadership: Communication and Leadership

This course will discuss the key principles of effective communication as a leader. Learn how to create memorable and persuasive messages, ask thoughtful questions, engage in active listening and choose the right medium (face-to-face conversation, video conference, phone call or email) for your messages. Attendees will also be guided to set and communicate goals for maximum benefit while avoiding the common pitfalls of overly ambitious targets.

As of March 2025

**Courses taken by first-year Accelerated students*



Wharton Leadership: Human and AI

While most discussions of the impact of generative AI in organizations are about the threat to jobs, business leaders must develop a positive vision that does not focus solely on how to use AI to replace human labor. In this session we will discuss a framework drawing from behavioral science, computer science and management to sketch the outlines of a new division of labor between human and artificial intelligence.

Wharton Leadership: Optimizing the Intelligence of Group Decisions

What is the most intelligent way of making group decisions? For generations, organizations have been warned about “groupthink” – and told that people are much smarter when they act alone, as solitary, reflective individuals than when they behave as members of interacting crowds. Yet every decision in organizations must be made with others – voting, predicting stock prices, estimating risks, and anticipating changes in performance. How can we make the best use of the intelligence of those around us? This course reveals the power of social networks to extract a profound new wisdom that comes from people’s ability to influence one another.

Unmasking Fraud

International crime syndicates are targeting America on an unprecedented level. They’re after Americans’ bank accounts, personal data, nest eggs and more. Scammers are leveraging AI and other technologies, playing on peoples’ emotions and manipulating consumers of all ages like never before to steal their financial assets and identities. Through this session, attendees will learn about how criminals are targeting Americans, elder financial exploitation, consumer vulnerabilities, common scam signs and bank strategies to combat scams and fraud.

As of March 2025

**Courses taken by first-year Accelerated students*



Elective Course Descriptions

35-40 electives offered each year for Accelerated, Year 2 and Year 3 participants to augment their learning and educational experience.

Bank Financial Management: The Fortress Balance Sheet

A Fortress Balance Sheet is designed to withstand the perils of unexpected shocks while also delivering durable financial performance across the business cycle. In this course, deconstruct the balance sheet into its component parts; examine the risks, roles and performance characteristics of each balance sheet quadrant; explore how to balance risk with capacity and performance; and rebuild our parts back into a stronger, more resilient and better performing whole.

Bank Portfolio Investments

This course takes a broad-based look at the typical bank investment portfolio. It focuses on the yield and risk features of investment alternatives currently available in the capital markets. The course will use real-world tools and analytics to demonstrate how these products are selected and managed. Added emphasis will be given to mortgage-backed securities.

Bank Stock Outlook: Forecasting and Valuation

This course will focus on the outlook for the U.S. large-cap banking industry, keying in on current income statement and balance sheet trends and expectations, as well as the evolving regulatory landscape. Explore the key factors that bank stock investors are currently contemplating and examine the drivers of earnings growth and look at how to forecast future results.

Barriers to Boundaries: Reframing the Value of Risk Management

In this course, learn what risk management is and how it has evolved in the banking industry. Delve into the challenges of a siloed risk framework, and how to adjust it. Attendees will learn to understand institutional scope and complexity, risk culture appetite, the three lines of defense model and the basics of using risk management to propel organizational development.

Branch Network Optimization

Despite the rampant growth in electronic channels, the branch remains the predominant venue for new account sales. Yet, branches consume significant resources in capital and non-interest expenses. This course will address the evaluation of new branch opportunities, closure decisions, merger candidates and more. Attendees will learn strategies for integrating branch networks with electronic channels, branch design, technology and equipment innovations that facilitate savings.

Elective Course Descriptions

CECL and Credit Risk

The CECL accounting standard requires banks to measure the credit risk that they are managing. Starting from a very basic level, learn how banks should address CECL implementation, not to merely comply, but to address the practical concerns risk officers, board members and investors will have. Special attention will be paid to operational challenges banks will face, both large and smaller institutions.

Corporate Governance

This course is designed to give banking executives an overview of the most important issues of modern corporate governance. After completing this class, participants will be able to interact effectively with their board of directors. Topics discussed include the role of independent outside directors, executive compensation, institutional investor activism, the market for corporate control, governance guidelines and issues related to the Sarbanes-Oxley Act.

Customer Experience

This course provides instruction for developing a customer-centric strategy, and key components to establishing and sustaining that strategy. Students will gain a holistic understanding of the levers necessary to realize their strategy, using leading edge tools such as journey mapping. Focus on key performance indicators that drive accountability across the enterprise.

Cybersecurity Overview

This course will cover the evolving cyber threats specifically in financial services, regulatory issues and best practices for cyber risk management. Specific reference will be made to two case studies on major cyber breaches in financial services.

Data Management: Principles, Trends and Regulatory Requirements

This course will incorporate role play and case study work into subsequent discussions to help students gain a practical understanding of data management concepts and common organization models in banks of varying sizes. Attendees will share perspectives on data needs across organizational functions and bank business lines and learn leading practices for governing data with a focus on data quality, protection and resiliency.

Drive Bank Performance Using Data, AI and Actionable Intelligence

In this course, discuss how banks can modernize their information capability without wasting time and money. Attendees will learn how to make better data-driven decisions with analytics and discover a path to helping their organization become a fully intelligence-driven culture.

Elective Course Descriptions

Emerging Issues in Advanced Payments

Payments are a key component of the banking relationship. This course will cover the current trends in payments including regulation, fintech, new payment rails as well as the effect that payments have on the economics of the overall bank. By the end of this course, students will understand the latest trends and challenges in the payments space and how to evaluate and optimize each area of payments within an organization.

Everyday AI for Bankers:

This course's goal is to provide students with practical insights into leveraging everyday AI tools. The course will combine foundational learning with a strong emphasis on hands-on application, ensuring participants leave with actionable skills they can immediately apply to real-world banking scenarios. This course is designed to touch on key areas of a bank. Each topic is not only foundational but also holistically transferable across diverse banking roles, from compliance to marketing, operations, credit, and HR.

Fintech: Friend or Foe?

This course will delve into the evolution, current landscape and potential opportunities and threats of fintech firms in the U.S. banking system. Discuss the historical perspective and evolution of fintech, their technological underpinnings and the current regulatory relationship. Students will learn about the potential benefits and risks of fintech partnerships.

Global Business and Communication for Team Performance

A key global business skill is understanding how to manage people and business dynamics in different parts of the world. This session will give participants the tools to understand these different business practices and how to strategically use the understanding of job satisfaction and motivations in other countries.

Growth Strategies for Any Economic Environment

As the race for core customer relationships, non-interest income and talent intensifies, it is imperative to have your bank positioned for growth if you want to succeed. During this session, explore specific and actionable strategies to grow core customers, increase non-interest income, develop your team, and improve overall financial performance.

Identifying and Managing Problem Loans

This course will explore the lifecycle of a problem loan from its inception, through its identification to its resolution to provide bankers with the tools and techniques necessary to protect their bank's investment in their loan portfolios. Students will be expected to compare their own problem asset processes with the problem asset management guidance offered in the course. This course will cover both commercial/industrial loans and commercial real estate loans.

Elective Course Descriptions

Increasing Non-Interest Income in Community Banks

By exploring traditional and non-traditional sources of NII, students will learn about specific strategies including but not limited to deposit product fees and profitability, debit card income, and various miscellaneous fee considerations. Discover the effects of regulatory change and examine the need to replace lost revenue. Discussion will include the effect on bank profitability and culture, incorporating common pitfalls in implementation and how to avoid them.

Innovation 360^o

This session examines all aspects of innovation in your business model. From sales and marketing to business processes, discover potential areas of focus and why they are prime for innovation and can help you build a competitive advantage. Participate in a range of strategic thought leadership exercises and learn practical tools and techniques to take back to your financial institution.

Interest Rate Derivatives

This course will present a practical overview of interest rate derivative markets and products, as well as the strategies most often used by regional and community banks. The instructional team will also present role-specific, hands-on case studies.

International Banking and Foreign Exchange

The goal of this class is to equip participants with knowledge regarding two main aspects on international banking: (1) the theoretical underpinnings and structure of currency markets; and (2) the practical implications for participating in international transactions and dealing in foreign currencies, in markets such as payments and managing of currency risk.

Intro to Process Improvement Techniques

This course will introduce the Process Improvement techniques and strategies commonly used in the Financial Services Industry with a focus on Lean Six Sigma. The benefits and synergy of applying Lean and Six Sigma will be explored. Students will learn about the history and development of the Lean and Six Sigma methodologies, and will explore the DMAIC (Define, Measure, Analyze, Improve, Control) approach to problem solving as the primary focus of the sessions. Common tools and techniques for each phase of the DMAIC approach will be introduced and explained. Throughout the course, examples of how Lean Six Sigma has been used in the Financial Services industry will be applied.

Liquidity Management

This highly interactive course provides students with a practical opportunity to study a case bank's liquidity position. Participants will be able to evaluate how traditional liquidity metrics compare to today's new regulatory requirements with a focus on the Liquidity Coverage Ratio (LCR). The students will be divided into teams, each with their own case-study bank to manage. Teams will compete to have the bank with the highest overall net income while trying to manage four important banking metrics: liquidity risk, capital, asset quality risk and rate risk.

Elective Course Descriptions

Managing Debt Cycles

Most community bankers manage their bank from one budgeting season to the next which often leads to reactive decision making. This course is designed to help bankers understand how debt cycles drive money supply in the financial system and rates of change for borrowing/saving levels over time. Participants will be able to understand what a debt cycle is, understand what drives each debt cycle, understand how debt cycles impact your bank and prepare for each phase of the debt cycle.

Managing Technology

In this course, learn practical tips for how non-technical bankers can succeed in managing technology. Receive an overview of key industry technology trends, as well as predictions concerning what lies on the horizon for our industry. The course provides pragmatic management tools that bankers can use to evaluate new technologies, justify new business investments and manage new system implementations.

Mergers and Acquisitions

This course will focus on the M&A process highlighting differences between the buy and sell side. Using value contributors and detractors, the class will learn to position a bank for M&A. The course will also delineate critical issues to consider in the M&A process and will discuss the pitfalls to avoid. Finally, a case study will bring together the concepts of the class into a real-world application.

Money and Capital Markets

This course focuses on how depository institutions interact with various capital markets, such as money markets, mortgage markets and treasury markets. Students will examine the role of the Federal Reserve within this process, focus on fundamentals and learn how these types of markets can be used and regulated.

Navigating Talent Management

Identifying, assessing, developing, engaging and retaining high-potential, talented employees requires navigating complex “grey” areas. In this course, explore the key factors to navigate talent management and develop great teams. Focus on how to use a talent management process to identify and develop talented employees and discuss motivation vs. employee engagement. Attendees will learn how to turn theory into practical solutions for their organizations.

Negotiations

This elective course engages participants in a series of negotiation experiences that simulate business and organizational negotiations. The focus is on developing basic negotiating skills for both one-time haggling situations, as well as situations that call for creating opportunities for mutual gain as part of a long-term business relationship.

Elective Course Descriptions

Operational Risk

Operational risk exists in every company. Over the last 20 years, the operational risk management (ORM) discipline has matured substantially, developing tools, techniques and strategies for managing these risks, with emphasis on efficiency and effectiveness. In this course, attendees will develop a detailed understanding about this category of risks and explore some of the more common management methods.

Opportunities and Challenges in Commercial Real Estate

This course explores the current environment of commercial real estate (CRE) lending from bank, customer and regulatory perspectives. Review the latest research and real-world examples of successes and failures in a time of competitive pressure and uncertain property values. Attendees will receive market planners and other tools for use in their home markets. Note: This course does not focus on underwriting or loan policy.

Principles of Lending for Non-Lenders

In this course, learn the credit process framework components including risk rating and portfolio management. Focus on the activities associated with qualitative and quantitative analysis when meeting with a commercial borrower. Then, how credit must be structured, risk rated, priced, documented, monitored and managed to achieve the best possible outcome for the institution.

Profitability Through Pricing and Balance Sheet Management

Effective balance sheet management helps optimize a bank's assets and liabilities, ensure financial stability and drive long-term profitability, while mitigating risks. In this course, get an understanding of the discipline needed in the ALM (asset/liability management) process, and learn how to develop a target balance sheet. Discover how role pricing comes into play through real-life case studies and delve into the details and definitions of pricing models.

Role of the CFO

The technical aspects of financial management for a community financial institution get lots of attention, as do leadership and management in general. But what happens at the intersection of leadership and financial institution finances? In this course, learn about the roles, responsibilities, opportunities and challenges of the CFO position.

Shadow Banks and Fintech

The course will examine the short- and long-term implications for incumbent banks and the financial system, and how fintechs in each sector are competing with each other, with traditional finance companies and with incumbent banks. Participants will survey the potential effects of various types of crypto-oriented businesses, with a particular focus on the implications for regulated banks, regulators and monetary policy of stablecoins and central bank digital currencies (CBDC).

Elective Course Descriptions

Smaller Business Lending

This course focuses on small business lending strategies, taking account of the challenges presented by the availability of a relatively low volume of borrower information, thin management depth and prospective conflicts in business vs. owner financial interests. Consider how to address these challenges and learn how to balance credit risk parameters with revenue and market share goals.

Strategic Workforce Development: Capability, Competitiveness and Continuity

This course provides an overview of strategic workforce planning and development (SWP&D). Participants will learn to articulate a compelling case for these actions, and the role of leadership applying SWP&D to ensure competitiveness and continuity of an enterprise. Through group discussions, case examples both within and outside the financial services industry, tools and readings, students will be better prepared to advise how SWP&D can enable business units and the companies they support.

The Value of Social Leadership and Social Media

In this session, discuss the strategy and planning required for your bank and leadership team to succeed in the fast-changing world of social media. Review effective ways to increase brand awareness, mitigate risk through crisis management and develop business opportunities through social selling. Learn to become a trusted thought leader, increase employee engagement, extend customer service offerings and recruit top talent for your bank.

Third Party and Vendor Management

In this session, participants will look at the use of outsourcing from the banker and regulator perspective. Explore the costs and benefits of outsourcing, including the vendor selection process, as well as best practices designed to mitigate risk – and participate in a Q&A session.

Understanding Differences

This course applies the Social Style Model™ to understand behavioral patterns that affect interpersonal relationships at all levels. The program provides an understanding and appreciation of the value of the diverse behavioral styles that are demonstrated every day. Because each interaction has the potential of working for or against you in producing desired results, this session provides specific strategies that will allow you to “adapt” your behavior to gain greater endorsement from others.

Understanding the Cash Flow Statement

This course provides participants with the fundamentals of cash flow analysis to increase their understanding of how a company can repay a loan from its cash flow. This introductory course provides additional tools for effectively evaluating the financial strengths of a company and its ability to repay a loan. Through group discussion and group exercises, participants will work through a cash flow construction exercise.

Elective Course Descriptions

Virtual Presentation Skills

Presenting in critical customer briefings, sales calls, trainings and business updates for your organization in a virtual environment can be challenging. This course provides an interactive introduction to best practices for virtual delivery, including strategies to create rock-solid connections with virtual participants, tips for setting up a successful virtual presentation and more.

What to Know if You Plan to Grow Beyond \$10 Billion

This course allows bankers to better understand the regulatory implications of crossing the \$10 B threshold. We will focus on the impact of regulations and examiner expectations of a \$10 B plus size bank, while addressing the cost benefit analysis and strategy to expand. Our focus will be on a robust conversation highlighting important components such as execution strategies, infrastructure needs and effective corporate governance.