
Y2023 Credit Union Catalogue

**Speaking-Facilitation-Training-Consulting
Topics & Services**

***"Providing Strategies for Success"
To the Global Credit Union Movement***



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Program Topic #1
Greatness—Not Just Goodness Needed in New Age Leadership

This program will explore the characteristics, styles, and methods of effective leadership that will be needed to successfully lead your credit union in the future.

Learner Outcomes:

- To understand the differences between leading and managing.
- To review and compare different leadership styles that exist in business situations and the importance of maintaining “emotional intelligence”.
- To explore the key future competencies needed (including crisis management, **“Admired”** Values-Based Transformational Leadership, and Maintaining the CU Passion Best Practices) for effective leadership and their impact on credit union performance.
- To discover action steps toward Leadership Greatness.

Participants will receive an **“Exec-Check”** List and access to a **“Free Leadership E-Book”** to assess their current organization and personal leadership competencies.

Audience: CEOs, Senior Staff, Board of Directors, Volunteers.

Length of Program: 1½ hour to 3 hours presentation-*Great Keynote Topic*

Program Topic #2
3Rxs for Future Effective Credit Union Boards: Recruiting/Retaining/Revitalizing Next Generation Directors

This program will explore methods for identifying, recruiting, and retaining credit union volunteers including an overview of the roles and responsibilities and succession of board members.

Learner Outcomes:

- To identify the right type of persons to serve.
- To explore proper recruitment emphasizing younger new candidates.

- To create strategies for a “**Balanced Board**” that reflects membership.
- To review methods of training, reward, and recognition to energize.
- To review the characteristics of revitalized successful board members and high-performing credit union boards.

Participants will receive a “**Directors-Check**” List to assess their volunteer competencies.

Audience: CEOs, Board of Directors, Committee Members, Volunteers.

Length of Program: 1½ hour to 3 hours presentation.

Program Topic #3
Building A Productive CEO/Board Relationship:
A Marriage Made In?

This program will explore the characteristics of effective relationships between the CEO and the Board. The session will highlight best practice activities, performance indicators, work styles, and methods of maintaining positive and productive relationships.

Learner Outcomes:

- To explore how to create an environment for communication and mutual understanding.
- To gain an understanding of what constitutes effective Board/CEO relationships.
- To review effective duties, role clarification, and responsibilities.
- To learn the key future competencies and keys needed to maintain high performance and lead the credit union effectively.

Audience: Board Directors, Volunteers, CEOs, and Senior Staff.

Length of Program: 1½ hour to 3 hours presentation.

Program Topic #4
7x24x365: Becoming A World-Class
“Member-Centric” Service CU Organization

This program will focus on the critical elements of serving and meeting Members' "**Lifetime/Life Stage**" needs more effectively. The session will provide insights into the key methods of how credit unions can provide "*Five Star*" quality member service utilizing a variety of retail high touch/ high tech cross-sales and service techniques. In addition, how to "Wow" members with memorable personal and E-service (brick & click) experiences will be explored.

Learner Outcomes:

- To discover how the CU can deliver world-class personal service.
- To discuss effective methods of delivering "click & mortar" quality retail type member service and review *Benchmark* service organizations.
- To discuss the impact of giving and not giving members "what they want" (quality service) and how they want it (now) on the credit union.
- To explore changing the way we do business to trusted advisors providing members with "memorable quality service experiences."

Audience: Front Line/Member Service/Management/Operations Staff.

Length of Program: 1½ hour to 3 hours presentation.

Program Topic #5

Growing Against the Grain: Best Practice Revenue "Thrival" Strategies for a Post Covid-19 Economy

This program will focus on how credit unions can maintain their competitive edge against the post-pandemic economic changes in the financial services arena. Techniques and strategies for positioning credit unions against competitors, increasing loan volume via the next generation of borrowers, and new business growth opportunities (Serving New Americans/Small Business Services/Lifestyle Lending/Trust Services and Review of Fee Structures) will be discussed. New ways to connect/attract members and maintain their good faith during a recessionary time and a look at some "Best Practice" Growth Credit Unions will also be highlighted.

Learner Outcomes:

- To identify and assess the new financial services competition.
- To understand and utilize the Credit Union Competitive Advantage by telling our Strategic Story to our members and the community.

- To discuss the impact of remaining competitive on credit union operations and service delivery during post-pandemic economic times.
- To explore strategies for thriving by being your members' first financial responder, growing revenue, gaining a competitive advantage, increasing loan volume, and growing *Market/Wallet* share of credit union products/services.

Audience: CEO, Senior/Operations Staff, Board of Directors, Volunteers.

Length of Program: 1½ hour to 3 hours presentation.

Program Topic #6 *NEW*
CU Visioning Project 2033:
"Re-Imagining the Credit Union of the Future"

Using a Futuristic theme, this program will give you a better understanding of the environmental change trends and developments that will affect credit unions' performance in the next decade (business, economic, demographic, technological, and consumer service sectors). A look at how credit unions will evolve and what they will look like operationally and in serving future member needs via technology will be explored & highlighted. **Key Strategic Thinking Points (STPs) Strategies** and their impact on credit unions will also be discussed during this session.

Learner Outcomes:

- To give credit union leaders a better understanding of the future business environment in which credit unions will operate.
- To help you make more informed strategic decisions based on trend factors and your credit union's key competitive advantages.
- Highlight insights from "***Best Practice Innovative***" Credit Unions on how members will be served in the future.
- To give you an understanding of how changing technology will drive the need to **Re-Imagine** our credit unions in serving members to compete in the future financial services marketplace.

Audience: Credit Union CEOs and Staff, Board of Directors, Volunteers.

Length of Program: 1½ hour to 3 hours presentation with discussion.

This makes for a great Keynote/Breakout Session program topic at annual meetings, conferences, and chapter meetings.

Program Topic #7
Talent Management: Recruiting/Retaining & Leading Today's Multi-Gen CU Workforce for High Performance

This session will explore techniques for effectively recruiting and keeping employees inspired and productive. Key factors for retaining and strategies for motivating different generations of staff for effective performance during “**The Great American Resignation Re-Set**” will also be highlighted. This session will also include a discussion on identifying and creating positive workplace climate indicators for cooperation/results.

Learner Outcomes:

- To learn effective strategies for attracting workers to your Credit Union.
- To learn the “new Psyche” of different generations of employees and what *really* motivates the diverse American workforce.
- To review contemporary workplace trends and their effect on your CU.
- To discover techniques for enhancing your workplace to create a more productive environment and understanding the management keys for “**inspiring**” staff for peak performance.

Audience: Senior Management, all levels of Supervisory/HR Staff.

Length of Program: 1½ hour to 3 hours presentation.

Program Topic #8
"Finding The Heirs Apparent": Leadership Succession Planning for Ensuring Your Credit Unions Future (CEO/Board)

This session emphasizes the importance of credit unions being prepared for changes due to sudden or planned loss of leadership situations. Key elements of how management and the board can sustain and ensure the success of the credit union through proper planning will be highlighted.

Learner Outcomes:

- To learn the importance of being prepared to face transitions due to change or sudden loss of key CEO/Board leadership.

- Review timelines and action steps in the Succession process.
- Discover the key elements of how management and the board can sustain and ensure success through proper planning and actions.
- Learn the strategies for recruiting a **“Balanced Board”** reflecting your credit union's FOM.

Participants will also receive a sample **CU Succession Plan Timeline** for CEO/Board use in creating/modifying your credit union's plan.

Audience: CEOs, Senior Management, HR Staff, Directors.

Length of Program: 1½ hour to 3 hours presentation.

Program Topic #9

“Mapping Out Your Credit Unions Future”: A Strategic Planning Primer for CU Leaders

A Strategic Plan is now a top priority for examiners. Regulators are encouraging CU's to develop and monitor performance against the plan. This session will guide credit union leaders through the Strategic Planning/Thinking process by covering the key components for back-home use. Areas covered include e-scanning, cu vision/mission, conducting a SCOT (strengths, challenges, opportunities, threats) Analysis, goal setting, identifying competitive advantages, growth strategies, and becoming a member-centric world-class service credit union. As a bonus, each attendee will receive a **“CU Scorecard”** to assess their credit union's performance.

Audience: CEOs, Board of Directors, and Committee Members.

Length of Program: 1½ hour to 3 hours presentation.

Program Topic #10

New Blood Volunteer Strategies: “The Pros & Cons of Term Limits & Paying Directors to Play”

This program will emphasize the importance of credit unions being proactive and prepared for elected leadership changes. Key elements of

how management and boards can sustain and ensure a system of new volunteer opportunities and succession will be highlighted. The program will include an interactive discussion of the advantages and disadvantages of limiting Board tenure and paying directors as a possible solution for transitioning “new blood” into the Credit Union Board/Committee volunteer structure.

Audience: Volunteers, Board of Directors, CEOs.

Length of Program: 1 ½ hours presentation.

Program Topic #11

"The CU Good Governance 'Dash-board' Model": Board & Committee Duties and Responsibilities

Using an automotive theme, this program will highlight how our credit unions can position themselves as ethical financial institutions by promoting Good Governance Practices, Business Ethics, and High Performance.

Learner Outcomes:

- To understand proper board/committee member roles and models for Boards conducting business.
- Review the key duties of elected officials and samples of Best Practice Boards.
- Learn to establish Good Governance Best Practices by reviewing “Dash-Board” activities that can drive credit unions toward more effective policies and performance.
- Discover how Credit Union Boards can position themselves as ethical financial institution governing bodies.

Each participant will receive a “**Dash-Board” Director Competency Evaluation**” that can be used as a model for back home development.

Audience: CEO, Board of Directors Volunteers, and Committees.

Length of Program: 1 ½ hour to 3 hours presentation.

Consulting Services/Corporate Facilitation Topics

- **Board/Staff Strategic Planning/"Futuring" Programs and Retreats (1-2 days)**
- **"Re-Imagining Your Credit Union": A futuristic look at how credit unions will look/operate and how they will be serving members in a new age high-tech diverse world.**
- **Facilitator for "The BIG I-DEA" session. An "I-DEA CAMP" open forum Key issue discussion session where participants bring samples of products/services that are working well in their credit union. This Show & Tell activity will allow all participants to bring home product/service ideas that work.**
- **Moderator for Networking-Roundtable-Panel Discussions *"What's Your Problem?"* An open forum discussion session where participants can bring industry and workplace problems and issues seeking solutions, feedback, and ideas from peers and facilitators. (Provocateur Role)**

Organization Consulting-Customized Staff/Board In-House Training Programs

- **Going from A Good to A Great "Member Centric" World Class Service Credit Union**
- **Business Growth Strategies**
- **Preventing Tribal Warfare: Building a Productive CU Workplace Staff *"Dream Team"***
- **Managing Change**
- **Crafting Mission/Vision and Values Statements**
- **Credit Union Leadership (CEO/Board) Succession Strategies**
- **Board "Good Governance" Development**

About John A. Vardalas CAE/CUDE

Personal Mission: To help individuals and organizations reach their potential by providing "Strategies for Success".

John A. Vardalas is an International Credit Union Business Consultant, Speaker, Author, Sage, and Founder/CEO of The American Boomer Group, a Madison Wisconsin-based Speaking/Consulting Business dedicated primarily to developing credit union leaders and organizations to reach their potential.

His work as a speaker/trainer and consultant focuses on helping people become more effective, business growth strategy, world-class service, and building productive workplaces. An international trend watcher and provocateur, he also helps leaders synthesize industry trends into strategic organizational directions. He is one of the most popular speakers in the credit union industry (affectionately described as a *Credit Union Evangelist*) and has spoken before thousands of credit union staff and volunteers during his over 40-year credit union career. He is also committed to improving the quality of life of America's baby boomer generation and making a difference in consumers' lives. He was formerly the *Director of National Training Programs* for *CUNA Inc.* He has also been a program consultant and speaker for the *Filene Research Institute* and the *World Council of Credit Unions, Inc.* and has spoken to international credit union audiences in Australia, Asia, Canada, Europe, Central/South America, Africa, and the Caribbean.

As a **professional speaker**, John conducts and facilitates high-performance leadership/management and board development workshops, seminars, and keynote presentations for executives, staff, and volunteer leaders for credit unions, state leagues, chapters, national and international credit union organizations, and outside industry business groups and associations. He also **facilitates strategic planning** sessions for a variety of asset-size credit unions and leagues throughout the USA. John is also a featured speaker on *CU WEBINARs* and international *EduCruises* during the year.

John has been the Chief Project Evaluator/Senior Faculty Strategist for the *Southwest CUNA Management School (SCMS)* as well as Project Evaluator for the *Southeast CUNA SRCUS Management School*. John has also worked with educational institutions serving on the faculty at the *University of Wisconsin Management Institute* and the *NCUA Examiner Schools*.

He has also been a featured speaker/senior faculty for global professional associations including the *American Society for Training and Development (ASTD)*, the *American Society of Association Executives (ASAE)*, the *Australasian Institute of Credit Union Directors*, *The National Center for CUs*, *Liberty FiTech*, and the *Callahan and O'Rourke Groups*.

Along with speaking, John has authored numerous articles published in *Credit Union*

Journal, Credit Union Times, and CU Business Management, and is a regular contributor on CU Insight. He has also authored a booklet titled “Leadership Thoughts for Prospering in the 21st Century” and The Credit Union “Dash-Board” Governance Resource Packet/CD to help CEOs/boards/committees improve their competencies. He is also a Co-Founder of Today’s Boomer Magazine, an online publication of The American Boomer Group.

John has a BA Degree in Education and Political Science from the University of Alabama. He holds the American Society of Association Executives Certified Association Executive (CAE) Designation. He is a member of the **\$6 Billion Summit Credit Union** and the **\$5 Billion University of Wisconsin Credit Union** for over 40 years and has served on the *UWCU Marketing and Member Relations Committee*. He is also a member of the *Filene Research Institute* and is a *Credit Union Development Educator*.

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