




# 2017 Supervisors TAKE ACTION Virtual Conference

November 7, 9, 14, 16 & 17

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This year's Supervisors' Virtual Conference carries a new theme— It's now the Supervisors' TAKE ACTION Virtual Conference. This year, we're bringing back some of your favorite speakers and topics, and some solid resources you can walk away with to start using with your team.

As an added bonus, Sandra McDowell, founder of the [eLeadership Academy](#), is allowing each registered participant to complete a FREE online leadership self-assessment. This tool is used exclusively by the [eLeadership Academy](#) and will provide scores that measure a leader's ability to *envision*, *assemble*, and *execute* with their team.



Each of the five sessions will also include a checklist or action plan. Each of our subject matter experts will challenge you to take action by applying the concepts from the virtual conference and using the five new tools.

In two weeks' time, we'll survey all attendees and report back on how much action has been taken. As supervisors in the credit union system, we have the power to move mountains and this year's virtual conference will prove it. Are you up for the challenge?

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**Register for the bundle by November 2!**

## WEBINAR DESCRIPTIONS

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### Coaching Phone Skills that Build Loyalty

#### SESSION #1

You've just stepped out of a meeting with your manager. 2018 is going to bring new challenges, lots of changes, and it's coming fast. You're still trying to accomplish everything on your 2017 plan. Your credit union is going to be focused on making outbound calls to your existing membership. While you think it's a great idea, you're sensing your team may push back. Many have expressed a fear about picking up the phone; it's not something they have much experience with. Some have said it's quicker just to send a text.

How do you, as their supervisor, get them onboard with the new initiative? How do you coach them through the change and support the development of their new skills? And, you've found yourself wondering just how much business can be generated over the phone.

Mary Jane Capps - The Phone Lady, author and recognized phone expert, will provide you with the insight and information you need to support your team in finding phone success.

**Take-Action Resource:** Business Telephone Etiquette

#### Key Learning Points:

- Understanding & Dismantling Phone Fear and Call Reluctance
- Coaching Your Team on Essential Phone Skills
- Providing Motivational Feedback

**NOVEMBER 7, 2017**  
**1:00 - 2:15 PM ET**

**REGISTER NOW**

**Register by November 2!**

## WEBINAR DESCRIPTIONS

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### Holding Your Team Accountable

#### SESSION #2

Every leader, at some point in time, faces the challenge of dealing with employees who avoid being accountable for their actions or standards of performance. It's easy to hold your rock stars accountable—they have a high level of self-motivation and will take on any task. But how do you hold the unaccountable to the same standards of accountability and keep your team moving forward?

Accountability is a critical component in an effective team; but for many supervisors it doesn't come naturally. It takes practice, new skills and sometimes a different approach. In this 75-minute session, we'll provide practical tips, suggestions and strategies including traits your team must see you portray each day to build trust and accountability. This session will help you build an accountability culture with your team.

**Take-Action Resource:** Steps to Personal Accountability

#### Key Learning Points:

- Identifying common excuses to avoid action
- Demonstrating trust to build accountability
- Communicating openly to build accountability
- How to identify accountable versus unaccountable characteristics

**NOVEMBER 9, 2017**  
**1:00 - 2:15 PM ET**

**REGISTER NOW**

**Register by November 7!**

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### Achieve Your Department Goals - Envision, Assemble and Execute

#### SESSION #3

As the supervisor of your department it's your responsibility to ensure plans are rolled out and goals are achieved. Your role as a leader is complex. You need to keep your eye on the bigger picture; your department, branch or organizational goals, yet not lose sight of how those goals are achieved through the collective effort of your individual team members.

Where do you start?

Join subject matter expert, Sandra McDowell, as we explore ways to ENVISION what is needed, ASSEMBLE the people and resources required, and EXECUTE to achieve your individual and department goals.

**Take-Action Resource:** Planning Feedback Checklist

#### Key Learning Points:

- Envision what's needed. Breaking organizational goals into bite size pieces for you and your team.
- Assemble the people and resources you need. Setting SMART objectives.
- Execute to achieve your goals, and recalibrate when needed.

**NOVEMBER 14, 2017**  
**1:00 - 2:15 PM ET**

**REGISTER NOW**

**Register by November 10!**

## WEBINAR DESCRIPTIONS

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### Develop Your Delegation Attitude, Aptitude and Altitude

#### SESSION #4

Have you ever hesitated to delegate something—figuring it was just as easy to do it yourself? Would you like to understand your resistance to delegation so you can evolve beyond it? Would you like to feel more confident and skillful when you delegate? Being responsible for “it all” doesn’t mean you have to do it all. If approached right, there is an entire team of co-workers, looking to strut their skills and help you out! So how do you up-level your delegation and put that team to work so your team can accomplish even more?

Sandy Russell returns in this highly regarded session to talk more about delegation. We’ll explore common barriers to delegation in both mindset and skillset and how to evolve beyond them so you can learn to let go and empower yourself and others with this important leadership tool.

**Take-Action Resource:** Delegation Checklist

#### Key Learning Points:

- What are the signs that you’re holding too tight to pieces you could be giving away?
- Why you hesitate to delegate
- What a higher altitude delegation mindset feels and sounds like & why it’s important
- What are the steps to ensuring a delegated task is handled effectively?
- Why a commitment to delegate is crucial for everyone’s career

**NOVEMBER 16, 2017**  
**1:00 - 2:15 PM ET**

**REGISTER NOW**

**Register by November 10!**

## WEBINAR DESCRIPTIONS

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### Ensuring Diversity on Your Team

#### SESSION #5

Nationally recognized, award-winning speaker, Tova Sherman, is best known for her fresh take on the inclusion of diverse communities. She will introduce you to communication tips that everyone can use. Whether a co-worker or member we all want to be understood and treated fairly. Over 90% of past participants indicated they would be able to apply what they learned from Tova, on the job. What others are saying about Tova?

*"Outstanding presentation" Loretta Bridgeman – Sunrise Credit Union*

*"Our employees at all levels of this organization were captivated by the delivery."*

*"Without a doubt your session was in the top 5 of training we have taken in the last 20 years."*

In this session Tova will challenge your thinking on visual and mental health impairment, hearing, cognitive, physical and invisible disabilities. Fasten your seat belts and get ready for one of the most entertaining and engaging educational opportunities to equalize the playing field!

**Take-Action Resource:** Leading an Organization to Overcome Unconscious Bias

**NOVEMBER 17, 2017  
1:00 - 2:15 PM ET**

**REGISTER NOW**

**Register by November 15!**

## SPEAKER PROFILES

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### MARY JANE COOPS

An accomplished author, speaker and facilitator, Mary Jane Copps aims to improve communication at all levels. Her illustrious career found her on the end of the telephone as a manager, a journalist, a salesperson, a researcher and a fundraiser where she sharpened her customer service phone etiquette and interview skills.

Mary Jane has spent 27 years analyzing the psychology of a phone call, information she now shares with entrepreneurs, not-for-profits, corporations and government departments in her mission to improve telephone interactions between businesses and clients (and vice versa!). The Phone Lady also helps her clients deal with their phone phobia and get them on track to becoming effective communicators who turn every phone call they make into lasting business relationships.



### JACQUIE CAMERON

Jacquie discovered her passion for coaching and empowering others to succeed while working at Bank of Montreal. While she thoroughly enjoyed the 15+ years spent in the financial management side of the business, the most rewarding experiences were always tied to working with others on their personal development and growth. This realization guided her decision to focus her career of inspiring others to unleash their potential through learning and development. For the last 15 years Jacquie has had the privilege of being involved in the development and delivery (in-class and online) of engaging learning experiences with a focus on promoting self-awareness, personal growth and self-leadership. She helps organizations align employee and organizational development initiatives to realize their strategic business goals in a variety of areas, including: leadership development and coaching, change management, workforce planning, performance management, team building, sales and service program design and delivery.

## SPEAKER PROFILES

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### SANDRA MCDOWELL

Sandra is a sought after speaker and facilitator on the topic of leading with the brain in mind. She has spoken for groups of all size, from teams of 5 people to international conferences with 2500 attendees. Sandra has a wealth of experience as a keynote speaker, webinar speaker and workshop facilitator.

Sandra has extensive communication, executive coaching, marketing, and leadership experience. She has studied marketing, emotional intelligence, attained a Masters in Leadership, received a Certified Executive Coach (PCC) designation, and a Certificate in Neuroleadership.

In her executive role as VP of Communication and Culture for First Credit Union, Sandra oversees the portfolios of Marketing and Human Resources. She is passionate about Credit Unions and the difference they make in their communities, and she has been the driving force behind a leadership and coaching culture that has resulted in increased engagement and leadership capacity.



### SANDY RUSSELL

Sandy is an executive/leadership & team coach, trainer and course designer with a 16 year background in HR and employee & organizational development. She brings a passion for inspiring and developing people to realize their full potential in leadership & life, along with a strong personal commitment to high quality business results. For the past 20 years Sandy has worked in a variety of industries including healthcare, retail, food & beverage, telecommunications, HR and financial services. For over 16 years she has worked in banking and credit unions in a variety of ways including 7 years as a facilitator for the national credit union system. Her experience with top employers has given her key insights into the workplace practices and leadership qualities that contribute to a healthy organizational culture. As a coach and trainer, Sandy empowers her clients to tap their inner wisdom, leverage their strengths, move beyond challenges and create values-based action. She challenges clients to increase self-awareness, raise their consciousness and step more fully into their personal power.

## SPEAKER PROFILES

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### TOVA SHERMAN

Tova Sherman is one of Canada's premier disability and inclusion experts. Since 2000, she has steered the dynamic, multi-service disability agency, reachAbility, into a premier trail-blazing model of excellence by leading the way in educational and employment focused community service and non-profit organizations. Tova has brought disability and diversity training to mainstream Canada by addressing the need for her customized no-nonsense, down to earth modules.

Tova's expertise and boundless energy is recognized across Canada. In 2012, she received the esteemed Queen Elizabeth II Diamond Jubilee Medal for service to this country. Today, Tova busily juggles her TV show, Inclusion Revolution with commitments to reachAbility and prestigious speaking engagements across North America.



# REGISTRATION & PRICING

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## Conference Bundle

Purchase a single seat in all 4 sessions. (Non-transferable, single employee only)

- **Corporate Members - \$399 (per employee)**
- **Pay As You Go - \$479 (per employee)**

[REGISTER NOW FOR BUNDLES](#)

## Individual Webinars

Attend as many webinars as you'd like and register for each separately. Use the "register now" links on page 2 or search by title in the [Learning Gateway](#) to register.

- **Corporate Members - \$89 (per webinar)**
- **Pay As You Go - \$110 (per webinar)**

[REGISTER NOW](#)



For more information or registration assistance, contact Client Solutions:  
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