"Post-Session 5" Assignment in <u>2 Parts</u>

Parts 1 and 2 are due to Gail Oueen by Monday, January 30, 2023

#1: Meet with your CEO or Senior Officer with whom you've interacted during the MDP:

- . Your CEO and Exec Team will have prepared specific goals to accomplish during 2023, most likely tied to your Bank's current 'STRATEGIC PLAN'.
- . Before you meet, share with your 'Senior Officer' both attached pages of the 'template' we reviewed during Session 5 on January 10-11.
- . Ask your 'Senior Officer' to select ONE of your bank's "2023 Annual Goals" you can use for this exercise.
 - . TOGETHER with your 'Senior Officer', discuss that goal and 'specific actions' that need to happen to ensure that the specific 2023 annual goal is successfully achieved.
- . Using the attached blank template, identify/list "3" tactical actions (left column), and for each action, complete the sections in the horizontal columns so, upon completion, you have on the one template page a list of 3 actions and key points in the corresponding horizontal columns that show you a few WHEN/WHAT/WHO/HOW 'bullet points' for that goal to be successfully achieved by 12/31/23.

. SHARE COMPLETED TEMPLATE WITH GAIL.

#2: Then, on your own, also before January 30:

Using all you have learned throughout the MDP...

. about yourself and what you feel you offer your bank...
. about your personal leadership style...
. about your personal management style...
. about your role as ambassador for your bank...
. about a bank's strategic planning process, AND
. about the importance of civic engagement/leadership in your community...

Prepare a few paragraphs

stating how in your CURRENT POSITION and in any NEW POSITION you may be striving to attain,

you

can best contribute to your bank's overall success!

. SHARE WRITTEN THOUGHTS WITH GAIL
You should thus send to Gail a 2-part completed assignment.

Thank You!
Andy Davies

Date.

Tactical Action: Action Steps use as many as needed	Completion Date:	Resources Needed	Primary and Secondary Responsibility	Comments - Tracking Progress to Goal:	Financial Impact:
list key points	show a fixed	carefully consider	NAMES!!!	rolling update as needed	will this tactical action
in this space for EACH tactical action	completion date	those resources	leader,	during entire time an action	result in a new expense
	AND any interim	needed to ensure	others involved	is being addressed	or generate income?
	dates that are	tactical action			
	appropriate	can be properly			as appropriate, quantify/
		addressed			expense OR expected
					additional income
Tactical Action: Action Steps #2	Completion Date:	Resources Needed	Primary and Secondary Responsibility	Comments - Tracking Progress to Goal:	Financial Impact:
repeat in same process as above					
Tactical Action: Action Steps #3	Completion Date:	Resources Needed	Primary and Secondary Responsibility	Comments - Tracking Progress to Goal:	Financial Impact:
repeat in same process as above					

Tactical Action: Action Steps	Completion Date:	Resources Needed	Primary and Secondary Responsibility	Comments - Tracking Progress to Goal:	Financial Impact:
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Tactical Action: Action Steps	Completion Date:	Resources Needed	Primary and Secondary Responsibility	Comments - Tracking Progress to Goal:	Financial Impact:
Tactical Action: Action Steps	Completion Date:	Resources Needed	Primary and Secondary Responsibility	Comments - Tracking Progress to Goal:	Financial Impact: