

“Post-Session 5” Assignment in 2 Parts

Parts 1 and 2 are due to Gail Queen 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

A Key Goal Goes Here (2023 Annual Goal)

Date:

[illegible]

Key Goals:

Date:

[illegible]