



 **Leadership
Needs
2025** 



**Monday, October 21, 2024
4:00pm - 4:45pm**

Executive Leadership Roundtable (Interactive Workshop)

- 4:00 - 4:05** **Set up**
- 4:06 - 4:30** **Break into (3) groups and brainstorm**
- 4:30 - 4:45** **Each team will report out (5 minutes)**



Leadership Needs 2025



This Executive Leadership Roundtable will focus on three of the most important leadership needs for 2025. Focusing on these three areas will help leaders continue to develop agile, forward-thinking organizations that can respond to rapid changes, harness the power of technology, and create inclusive environments where all employees feel valued and empowered to contribute.

- **Adaptability and Resilience:** Enables organizations to thrive in uncertainty and manage change effectively.
- **Digital and Technological Literacy:** Ensures leaders can leverage technology to maintain competitiveness and drive innovation.
- **Inclusive Leadership:** Fosters a culture of diversity, creativity, and engagement, crucial for long-term success and social impact.



Adaptability & Resilience



Deliverable:

Create a list of 3 - 5 important, tangible points needed to foster adaptability and resilience to create a solid business case

- Navigating Uncertainty and Change
- Maintaining Composure Under Pressure
- Fostering Innovation and Growth
- Building Trust & Influence

Partner:

CRF Member: Toni-Marie McLean



Adaptability & Resilience



Notes from Session:

Transparency – clear communication with teams (builds trust)

How do you maintain composure

- Be professional

- Be supportive and helpful

- List and prioritize issues

- Stick to the facts with timelines – remove emotion

- Create a safe place for discussion

- Identify areas that can be changed and those that can't.... Find common ground

Partner:

CRF Member: Toni-Marie McLean



Adaptability & Resilience



Notes from Session:

Navigating Change:

Create open eyes, no surprises

Share the benefits of why –

- Find the good in the issue

- What are the overall benefits

- Be patient and have understanding

- Have positive intent**

- Its ok to make a mistake

How to foster growth and innovation

- Its scary, but set goals to overcome the issue and share the vision

- Use the tools that you have

- Have the team understand and maintain a competitive edge

- It's ok to fail**

Partner:

CRF Member: Toni-Marie McLean



Digital Literacy



Deliverable:

Create a list of 3 - 5 important, tangible points needed to develop digital & technological literacy within a team

- Fraud Prevention and Risk Management
- Improved Efficiency and Accuracy
- Data-Driven Decision-Making
- Adapting to Evolving Payment Systems

Partner: Shyarsh Desai
CRF Member: Andrew Malueg



Digital Literacy



Notes from Session:

General

- Assessment of team as they currently stand

Fraud & Risk Protection

- Company-wide training
- Account fraud training
- Phishing testing
 - Step further: leaderboard
 - Corrective action (feedback, training, discipline)
- Resources (where to go when things go wrong)
- Business continuity planning
 - Where to go when transitions occur
 - Backing up customer information
 - Have a plan when things go down

Improved efficiency & accuracy

- Exposure to vendor presentations
- SOP review
- Alignment: management & front lines
 - Sincere investment in listening to feedback (management)
 - Shadow what the daily looks like
 - Front line's active role in solutions

Adapting to evolving payment systems

- Awareness of vendors & solutions
- Continuing education

Partner: Shyarsh Desai
CRF Member: Andrew Malueg



Inclusive Leadership



Deliverable:

How does Inclusive Leadership position you to build your career, brand, image and reputation?

- Value diverse perspectives
- Creating a positive work environment
- Align with progressive, socially responsible values, which strengthens a person's brand
- Opens doors to new collaborations and career advancements

Partner: Trevor Hughes
CRF Member: Nancy Topich



Inclusive Leadership



Notes from Session:

Diverse Perspective/Positive Work Environments

- Build diverse teams across the spectrum
- Use ice breakers to engage people to share ideas
- Have teams create teambuilding exercises
- Cross train to give others a broader business experience
- Use teambuilding to help others establish reporting relationships outside of their team
- For remote workers, use virtual use of Teams/Zoom using white board to create stories
- All meetings - camera on

Partner: Trevor Hughes
CRF Member: Nancy Topich



Inclusive Leadership



Notes from Session:

Building Career & Brand

- Sense of trust delivering results the right way, demonstrating inclusive leader traits
- Build trust with new team members, support buy-in of ideas
- Provide ongoing positive feedback when doing a good/great job. Catch them doing something right!
- Promote approachability with team members
- Share life experiences with team and encourage them to share theirs
- Have teams create teambuilding exercises
- Use we instead of I
- Give people your dedicated attention

Partner: Trevor Hughes
CRF Member: Nancy Topich