

# YOUR LOGO HERE

**Based on an MBA, created for  
the current & future leaders  
of the banking industry.**

## **What is Bank Executive Academy?**

BEA is an education & networking program built for the current & future leaders of the banking industry to learn the skills needed to enhance your organization's profitability & success.

## **How does it work?**

A hybrid of self-paced learning with expert-led facilitated live sessions to both learn and implement these practices within your company immediately.



## **Gain New Knowledge**

The tools & knowledge to become a master of people management & business finances.



## **Grow Your Network**

Join a network of your peers and make connections to leaders across our industry.



## **Access Expert Coaching**

Have bi-weekly live conversations & coaching with the experts of our community.

TO REGISTER & LEARN MORE VISIT:

**[GoalMakers.com/iba-s24](https://GoalMakers.com/iba-s24)**

HAVE QUESTIONS? EMAIL US AT:

**[Team@GoalMakers.com](mailto:Team@GoalMakers.com)**

# What is the Bank Executive Academy?

## A Cohort-Based Business Program

Based on a streamlined MBA curriculum, with relevant & actionable knowledge every leader in our industry needs. In just 10 weeks you will learn how to build organizational alignment, empower your team to serve your customers better, and the financial fundamentals to build a more profitable organization.

WEEK 1 & 2



Vision, Goals, & Planning Process

WEEK 3 & 4



Coaching Teams & Serving Customers

WEEK 5 & 6



Empowering People & Systems of Management

WEEK 7 & 8



Demystify the Finances: A 2-Part Case Study

WEEK 9 & 10



Apply the Finances: Grow the Bottom Line

## Live Expert Facilitation & Coaching

Every two weeks you will learn from, discuss, and gain new insights from conversations with industry experts, to help you implement & refine your experience in the program.



## Network & Learn From Your Peers

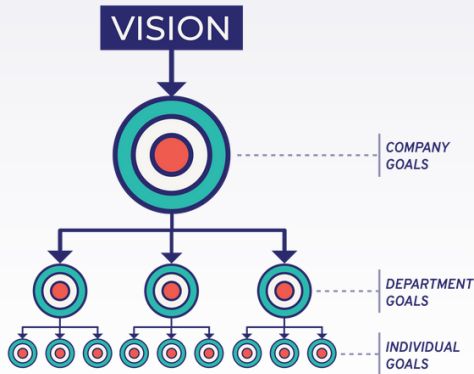
The Bank Executive Academy recruits a group of our peers to learn together. This is an opportunity to gain knowledge and network with fellow leaders during the program and join the growing alumni community.

## Gain the Bank Executive Academy Certificate

By the end of this course you will have the skills, knowledge, and resources you need to be more successful so let the world know it! Upon completion of this program you will receive a digital badge for LinkedIn & certificate of completion.



# Curriculum



## Set Goals All the Time

**Craft a vision, your long-term goal 3-5 years from now, and the North Star for your entire team. Learn what makes a 'good goal' and create company-wide, department-level, & individual goals that align with your vision.**

## Focus on the Process, Not a Plan

**Get a baseline of your company's current status by collecting valuable information from the entire team. Adopt an agile planning process to adapt in today's ever-changing conditions.**



## Coach the Right People

**Clearly define positions and create position descriptions for ourselves and key roles within your organization. Identify the right natural abilities and determine if your people are in the best place for success.**

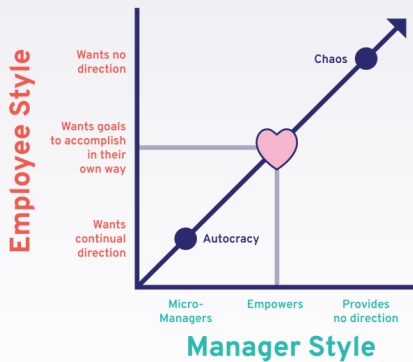


## Serve the Right Customer

**Identify your right customers, then determine how you find more of them. Build a sales process, streamline your operations processes, and foster a culture & strategies necessary to serve the right customer.**



# Curriculum



## Empower Your Entire Team

Learn how managers empower their team members by establishing clear goals and allowing people to achieve those goals in their own way. Implement our empowerment system of “wide boulevards, high curbs” as your management style.

## Do the Right Things Right

Use six simple tools to measure and manage your company’s performance. Build your own System of Managing, provide clarity and purpose, steering team members to accomplish their individual and the company's goals.



Year One	Year Two	Year Three
<b>Activities</b> Buy Stuff Plant 1 <sup>st</sup> Crop	<b>Activities</b> Buy More Stuff Plant 2 <sup>nd</sup> and 3 <sup>rd</sup> Crops Harvest 1 <sup>st</sup> Crop Sell Most of 1 <sup>st</sup> Crop	<b>Activities</b> Buy More Stuff Plant 4 <sup>th</sup> and 5 <sup>th</sup> Crops Harvest 2 <sup>nd</sup> and 3 <sup>rd</sup> Crops Sell Most of 2 <sup>nd</sup> and 3 <sup>rd</sup> Crops Sell Rest of 1 <sup>st</sup> Crop
<b>Revenues</b> \$0	<b>Revenues</b> \$10,000	<b>Revenues</b> \$22,000
<b>Expenses</b>	<b>Expenses</b>	<b>Expenses</b>
Tractor \$25,000	Tractor Tools \$5,500	Tractor Tools \$2,500
Fertilizer \$1,500	Fertilizer \$3,000	Fertilizer \$3,000
Seed \$800	Seed \$1,600	Seed \$1,600
Other tools \$2,000	Other tools 4,000	Other tools 3,000
<b>Cash left over or (owed)</b> (\$29,300)	<b>Cash left over or (owed)</b> (\$4,100)	<b>Cash left over or (owed)</b> \$11,900

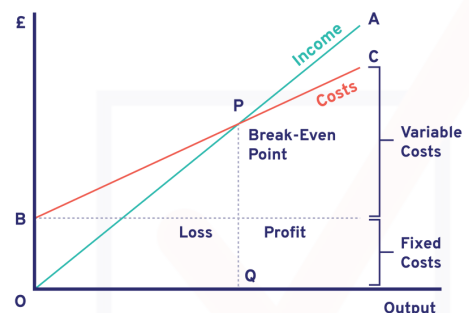
## Demystifying the Financials

Understand how to read and use your financial documents through our case study for real-world context. Learn how you can use the financial data to map (and improve) the bottom line.



## Applying the Financials

Focus on elements that grow (or shrink) the bottom line, starting by understanding the benchmarks within our industry and calculating how you can set realistic goals that you and everyone in the company can contribute to improve your EBITDA.



# Expert-Led Group Facilitations

Learn from the experts & community during bi-weekly live collaborative learning & implementation sessions.



## Program Kick-Off & Onboarding

Meet the cohort of your peers in the program! Then discuss how to use the GoalMakers platform and provide an overview of the curriculum and key dates.

## Vision, Goals, & Planning Process

Establish your personal goals to work toward and create action steps to achieve them. Then discuss market changes with the cohort and how we can create strategy adjustments to adapt to these external forces.

## The Right Team & Right Customers

Does everyone understand their role, are they in the right role, and how do you hire the talent you need to grow? Once you have the right team, determine how you can best define and serve the **right** customer.

## An Empowered System of Management

A great manager empowers their team to achieve their goals without micro-management or being hands-off, we will discuss both the empowerment style and proper systems to be a master manager.

## Demystifying the Financials

Financial understanding breeds accountability, we will discuss the key financial documents you must understand as you grow in your career.

## Applying the Financials + Graduation

How do you apply these financial lessons in your day-to-day? We close with guidance on how to continue your growth beyond this program.