

SPEAKING SERVICES

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Give your conference attendees what they paid for – education and entertainment! A former stand-up comedian, Jason uses his knowledge and humor to deliver meaningful and entertaining content to audiences nationwide. One of the most sought-after speakers in the industry, you can book with confidence knowing you have a name you trust on your conference agenda!

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- Leadership/Management/Board
- Member Service/Business/Cultural Strategy
- Wake-up! Series (Various Topics)
- Human Resources/Training
- Various Topics

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Jason Boles Speaking Topics – CU, Revised 12/04/2009

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evolving customers
into rock star
groupies

creating a
culture of
internal fans.

LEADERSHIP/MANAGEMENT/BOARD

FROM MANAGING TO LEADING

Are you a task master or motivator and developer of people? One is an important function of managing and the other leading, but both most likely falls under your realm of responsibilities – or at least should. Running today's ever-evolving and complex credit union requires solid leadership ability from all levels of management. The days of simply managing a team of people are behind us. Today's employees prefer quality leadership in a collaborative environment to be successful. This session will uncover how to evolve your status from a manager to a leader by discovering the qualities that make a leader effective.

MOTIVATING YOUR SENIOR MANAGEMENT TEAM

The satisfaction, motivation, and passion of your senior management team are all critical links to the organization's ultimate success. How is your senior team performing? What level of accountability do they have for organizational goals? What is their motivation, their passion? These are critical areas that warrant focus and direction in order for the credit union to attain its ultimate vision. Apathy in senior leadership is costly and catastrophic for the credit union. Come prepared to learn how to foster excitement and passion and how to coach this influential team to peak performance.

LEADING DURING TIMES OF CHANGE

Let's be honest, not everyone is a fan of change. Change can disrupt routine and create uncertainty in people. Assuming all staff is "on board" with the change event almost ensures failure from the beginning. Whether the change is radical or subtle, it is vital each leader assume their role and guide the change process smoothly and effectively. This session will uncover the components of leading successful change and why you should involve people – sometimes even your biggest critic – into the process.

INTERNAL NEGOTIATING SKILLS: CONVERSATION AS A MANAGEMENT TOOL

Effective negotiating is a powerful, and underutilized, management tool. Changing the approach in which you deliver a message to others can help maximize your effectiveness as a manager and leader. Come prepared to learn how to take your communication skills to the next level and discover how to sell your thoughts and ideas to key internal decision makers, direct reports, and outside vendor/partners.

THE STRATEGIC VOLUNTEER

Research supports that volunteerism has been on the decline for roughly thirty years. So, what is your motivation to volunteer your time? Are you serving or being served? As credit unions continue to evolve and become more complex financial institutions, the role of the director is critical to ensure the organization is ready for the challenges of today and tomorrow. If you are not getting what you need out of volunteering, what makes you think you are giving back? This session will discuss the role of the director and what you need to do to ensure you are getting the rewards you need in volunteering.

MAXIMIZING BOARD PERFORMANCE

The board, as a leadership body, is responsible for maximizing their efforts to effectively serve on behalf of the entire membership. How is your board performing? Are there certain areas holding you back from achieving your goals and guiding the credit union down the path to achieving its ultimate vision? Be prepared to discuss new ways to evaluate, communicate, and motivate to ensure ongoing success of your credit union.

CREDIT UNION GROWTH STRATEGIES FOR BOARD MEMBERS

Today's credit union will need to be prepared to face tomorrow's challenges. Gone are the days of easy and automatic growth. For future success, credit unions will have to be innovative and open to new ideas. This will require a different way of thinking and a different approach to running the business. Be prepared to explore new and innovative concepts to help your credit union grow and thrive during these unprecedented economic times.

RECRUITING AND RETAINING EFFECTIVE BOARD MEMBERS

As credit unions evolve and become more complex financial institutions, the roles of the director and the volunteer are vital to ensure that the organization is ready to face the challenges of today and tomorrow. Research shows us that volunteerism has been on the decline for roughly thirty years, and it appears that board members of the future may be more interested in being served rather than serving, an attitude that seems to be at odds with the credit union philosophy. So how do you turn around this trend—and should you even try? What motivates today's volunteer, and where do you go to recruit them? Discover the answers to these questions and more. We'll discuss the importance of strategically and effectively recruiting tomorrow's board member and ways you can ensure that existing board members and volunteers receive the recognition and rewards they also seek—and deserve.

MEMBER SERVICE/BUSINESS/CULTURAL STRATEGY

DELIVERING FANS: DELIVERING SERVICE EXCELLENCE

Credit unions have a long history of providing quality member service. For many years we've considered this one of the few key areas that makes us unique. But is this true today? In today's highly competitive marketplace, most financial institutions have raised the "service bar" and are actively seeking ways to exceed the level of service they provide. So, what makes your credit union unique today? This session is guaranteed to challenge the way you view service – and your members' expectations of service. Be prepared to view service through the eyes of the member – it may change the way you view it as well.

SMALL CREDIT UNION, BIG ADVANTAGE – STRATEGIES THAT WIN

If you run a small credit union you know better than anyone the challenges you face on a daily basis - limited budgets and staffing, the ongoing threat from the competition, and the constant struggle to remain relevant to your members. But are these challenges or could they be competitive advantages? Maybe it is as simple as changing the way you view and perceive it. The truth is smaller credit unions often outpace their larger counterparts in key areas such as growth and profitability. This session is designed to challenge the way you view your credit union's size. Be prepared to discuss ways to identify and market your strengths and how to turn your biggest challenge into your biggest advantage.

DEVELOPING YOUR BRAND

Just because you have a logo, it doesn't mean you have a true brand. Your brand is how your members, employees, and community feel about your credit union – the emotional connection. A strong brand can protect your organization and guide it into the future. Simply put, your brand is your face to the world. It should be conceived, designed, implemented, nurtured, and ultimately distilled into each aspect of your credit union. This session will take you through the various phases needed to design and deliver a brand that wins!

WHAT RETAIL REALLY MEANS

Credit unions have long wished to be their members' primary financial institution, but have only recently focused on being a true retail environment. Evolving your credit union from a traditional branch to a retail outlet can drive real change, but it involves many components. Many fundamental changes must take place from the way you design branches, deliver products, and serve members. Come prepared to learn ways to start your journey into the retail world of credit unions.

WAKE-UP! SERIES (VARIOUS TOPICS)

WAKE-UP! TIMES HAVE CHANGED!

The credit union environment has changed. The days of intense member loyalty, single sponsor support, and healthy, consistent growth are all but distant memories for many credit unions. The way you run the credit union, and the strategies you implement, must evolve to keep up with the rapid rate of change. Simply put, it doesn't matter what you did to be successful yesterday – those days are over. It only matters what you will do to be successful into the future. Prepare yourself for a glance into the future and discover what you will need to do to be ready for tomorrow's challenges.

WAKE-UP! BOARD AND MANAGEMENT: WE ARE ON THE SAME TEAM!

One of the key ingredients to running a successful credit union is the relationship between volunteers and senior management. Remove this element and failure is almost a certainty. With the ever-evolving complexity of running today's credit union, open and honest communication between both parties is a necessity. This session will uncover the dynamics that could possibly drive these two equally important teams apart, the dangers included, and what you can do to keep it from happening. Be prepared to discuss your personal role in helping maintain a unified team at the top.

WAKE-UP! CREATING A REAL SALES CULTURE!

In today's competitive environment credit unions are challenging the way they think about sales and marketing. Gone are the days of simply taking orders – today's members are fair game to the competition and there are plenty of financial institutions lined up ready to fulfill their needs. What are you doing to encourage members to use and stay with their credit union? As a not-for-profit financial cooperative you need your member-owners to use the institution in which they own. Then and only then can they find true value in membership. This session will introduce you to the various components needed to implement a real sales and service culture centered on building financial success with your members.

WAKE-UP! LEADERSHIP HAS EVOLVED!

Today's employee doesn't work well under yesterday's management style. Younger people don't thrive in a directive environment. They require their voices be heard and opinions valued. A true leader guides and develops people and encourages a collaborative and team-based environment. While directives will give you short-term results, long-term change can only happen through people and their ongoing participation in their personal development. As a leader you are ultimately accountable for your team's results. This session will help you maximize your team's potential through evolving from a manager to a true leader.

HUMAN RESOURCES/TRAINING

HR's VITAL ROLE IN BUSINESS STRATEGY

While people are your most important asset, they are also the most influential force in helping the credit union reach its strategic goals. Yet HR often gets overlooked during the planning process or trumped by other "more important" issues like the economy, technology or marketing. In order for human resources to add value to the credit union it should be viewed as more than a support department, but rather a vital business partner necessary for business success. This session will shed light on ways to align human resources with your credit union's strategic direction, including ways to foster internal business partnerships, and best practice ideas for turning your human resources department into a source of people solutions your credit union can't live without!

LAUNCHING A CORPORATE UNIVERSITY

Credit unions of all sizes have sought ways to be more effective with their limited training resources. A corporate university can offer your credit union the structure you desire, and the skill-sets your employees need, to be successful. A corporate university also helps connect training with overall business strategies by designing learning plans that facilitate the credit union's strategic plan. This session will outline the steps necessary to start building your corporate university today!

NEW HIRE ORIENTATION – FROM BLAND TO GRAND!

New hire orientation has traditionally been a blend of boring paperwork and outdated videos. Is this really the first impression you want to send to a new employee? This is actually the opportunity to impress your new hire, show them how much they are valued, and set them up for success! If you expect them to live your brand and represent your credit union's vision, mission, and values, you should probably review the new hire process and make enhancements that will make the program successful for all involved. This session will introduce you to simple and effective concepts you can implement to create a new hire event employees will want to attend again and again!

CREATING INTERNAL FANS: EFFECTIVE PEOPLE STRATEGIES

People are your most valuable asset. They are also the most influential force in helping the credit union reach its strategic goals. From recruiting, hiring, training – all the way to coaching, counseling, and terminating, today's HR professional needs to be prepared for the challenges they face on a daily basis. This session will guide you through the various people processes you should have in place to be successful, including key areas such as recruiting and retaining, measuring and evaluating performance, coaching and counseling, and designing incentive and reward programs. Come prepared to learn valuable ways you can implement and maximize the people strategies needed to be successful.

ELEMENTS OF ETHICAL BEHAVIOR

Few things can define a credit union's sense of character as effectively as its code of ethics, yet we often fail to commit the proper time and energy to align our ethical standards and policies with our vision, mission, and core values. Come prepared to learn how to incorporate the highest standards of ethical behavior into your policies and daily actions, and discover ways you can reinforce your ethical standards through your decision making process and training programs.

POSITIVE IMPACT PEOPLE: HIRING THE RIGHT PEOPLE

No matter what your strategic plan includes, having the right team members in place is vital to achieving success. Hire the wrong people, and you stand to pay the price in poor business performance, sub-par member service, and decreased motivation by superstar employees. Be prepared to discuss strategies and concepts you can implement to ensure you are hiring the right people for your team!

MAXIMIZING YOUR CROSS TRAINING EFFORTS

Cross training is an effective tool for developing and strengthening each of your staff members' professional skills as well as your team as a whole. Cross training also helps achieve efficiencies in operations and provides a safety net during staffing deficiencies. Proper planning and implementation are essential to your cross training program's success or failure. This session will uncover the benefits of cross training, why cross training often fails, and techniques to design and implement effective cross training programs.

TRENDS IN TRAINING: OFFERING TRAINING THAT MATTERS!

Human resources and training professionals today are working with downsized staff, increased workloads, lower budgets, and pressure to increase productivity. Have your training standards and processes kept up with these new demands? Do your internal customers see value in sending employees to training sessions? This session will uncover trends in training, including the various mediums now available, and will help you determine the best match for you and your organization. To implement training programs that are cost effective and most beneficial for your employees, topics must be relevant, delivered through a medium that meets their needs, and delivered by a trainer who is knowledgeable, understandable, and stimulating enough to keep their attention. Come prepared to learn how to run your training like a business!

VARIOUS TOPICS

THE POWER OF A WINNING ATTITUDE

You've met this person - the person who seems genuinely happy and well-adjusted. What is their secret? Or do they even have one? Successful people from all walks of life seem to have one common bond - a winning attitude! It is no secret that having a happy, healthy attitude can benefit all aspects of your life. This energetic, motivating session will uncover the "not so secrets" of having a happy attitude while you discover ways to take ownership of the most powerful force you have - your attitude.

INTERNAL NEGOTIATING SKILLS: CONVERSATION AS A MANAGEMENT TOOL

Effective negotiating is a powerful, and underutilized, management tool. Changing the approach in which you deliver a message to others can help maximize your effectiveness as a manager and leader. Come prepared to learn how to take your communication skills to the next level and discover how to sell your thoughts and ideas to key internal decision makers, direct reports, and outside vendor/partners.

JASON BOLES
BIO

Jason Boles is CEO of Fans Created, an innovative results-oriented speaking, training, and consulting services firm specializing in creating internal and external fans for organizations nationwide.

Jason has built a solid reputation as an energetic, entertaining, and thought-provoking speaker, trainer, and consultant. Blending his skills and experience in both stand-up comedy and the business world, Jason combines his knowledge and humor to deliver meaningful and entertaining sessions for audiences nationwide.

Holding management positions in both the hospitality and financial services industries, and serving as executive vice president of premier consulting firm Counter Intelligence Associates, Jason has successfully taught his "down-to-earth" business approach to organizations coast-to-coast. His straight-forward approach to life and business, along with his entertaining style, have been well-received by thousands of people over the years.

Jason served on the Board of Directors for the Kansas City Chapter of the American Society for Training and Development and earned his Certificate of Achievement in Training and Development from the University of Oklahoma. He is certified in various sales, service, leadership, and finance training programs and is a member of the National Speakers Association (NSA).

As a former stand-up comedian, and proven professional, your organization can book Jason Boles, the name you trust, with confidence.

CLIENT FAN MAIL
(RAVE REVIEWS)

"Our event was a complete success and your presentation contributed significantly to that success. In fact, your evaluations were the best of the six programs presented."

"I've had numerous comments about the information you shared being exactly what the participants needed, and in most cases something they felt was fresh."

"It was great that you could incorporate our information into your presentation and provide the staff with content they could benefit from. We received many positive comments about both your keynote speech and your afternoon class."

"We truly enjoyed the training and the management staff is actually looking forward to coaching their employees to use their new skills! Wow!! Thank you so much for such a wonderful presentation!!!"

"I can't remember training that I or my staff has received that was so pertinent to our jobs and yet so stimulating and entertaining. Your methods are unique to say the least, but your message comes across loud and clear."

"Not only did you give us the facts, you did a superb job of keeping the audience's attention. Your presentation style made it come alive! Thank you for making the conference so worthwhile for all in attendance."

"I thought Jason did an outstanding job of communicating and was enthusiastic in his presentation. He never got boring."

"It was the break I needed. I learned some things and had fun doing it."

"What can I say, Jason, you've done it again! It's a joy to work with someone who repeatedly performs in the outstanding category for presentations. Your sessions were once again noted as one of the strong points of our program."