



Succession Academy

 Kentucky Bankers Association



VAN HOOSER
LEADERSHIP



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LEVELING UP LEADERS FOR 35+ YEARS

Van Hooser Leadership exists to help you support your current leaders and equip your future leaders to develop the intentional leadership habits that drive lasting results.

We do this by building long-term relationships, serving as trusted advisors, and delivering customized leadership development based on experience, truth, practical application, and uncommon common sense.

WE ANCHOR OUR REPUTATION AND OUR RELATIONSHIPS IN THESE CORE VALUES.

CORE VALUES

LEAD INTENTIONALLY:

We are obsessed with advancing the cause of personal leadership. Everything we say, do, teach, and write is intended to prepare and empower individuals for their respective leadership journeys.

INTERACT HONESTLY:

Every meaningful relationship is rooted in the principles of honesty and integrity. We honor our relationships with clients and audiences by interacting with them in truthfulness and sincerity.

LISTEN INTENTLY:

Hearing your stories is critical to our work. We succeed by investing substantial time in listening attentively to our customers, their goals, and their aspirations so we can forge solutions that support them.

COMMUNICATE COURAGEOUSLY:

Candid, objective, two-way communication aids the fine art of discovery, which ultimately leads to better decisions and on-target outcomes for our clients and for us.

EVOLVE CONSTANTLY:

We value the past, but we refuse to be constrained by it. As workplaces continue to change, we promise to identify, develop, and apply lessons learned from our collective experiences to address the present and future challenges our customers encounter.

LOVE UNCONDITIONALLY:

We unashamedly love the organizations and individuals we are privileged to work with. Though we're all imperfect, we endeavor to see others not simply as they are today, but as who they will be with all the incredible potential they have to grow and achieve.



Presenter(s): Phil & Alyson

PREPARING FOR PERSONAL AND PROFESSIONAL TRANSITION

PHASE 1, SESSION 1 / FEBRUARY 27 – 9:00AM — 4:00PM

Audience: Top Executive Leaders, Key Decision Makers Only

Description: Development, introduction and execution of any meaningful organizational succession initiative requires a clear-eyed focus on its intended purpose, perspective and process. Proactively anticipating and navigating multiple strategic initiatives — at every stage of the succession journey — requires thoughtful succession preparation and performance at the executive decision making level.

This high-level, highly interactive session is designed to introduce and kick off the process of preparing banking executives for future succession successes. It will intentionally and purposefully prepare executive leaders to think through, then lead the internal transition process from its earliest stages to its successful fulfillment.

Key Learning Points:

- Help participants identify and overcome psychological succession obstacles.
- Prepare executives to successfully navigate the maze of change, transition and desired transformation which accompany succession.
- Learn to identify, evaluate, elevate and retain premiere performers as future organizational successors.



Presenter(s): Phil & Alyson

COMMUNICATION, CONNECTION AND SUCCESSION

PHASE 1, SESSION 2 / FEBRUARY 28 – 8:00AM — NOON

Audience: Top Executive Leaders, Key Decision Makers Only

Description: Designing a strategic succession plan is an important first step in the succession journey. Effectively communicating that plan to future successors and other interested parties is equally critical. Communicating intent ineffectively often creates unnecessary and unwanted discouragement, distrust and distractions within the organization. Conversely, effective, well-planned, well-timed communication creates the “X-factor” for such an important undertaking.

This session will build on Session 1 by focusing time and attention to the steps necessary for effectively communicating and implementing the succession objective. Participating executives and key decision-makers will be prepared with an appropriate communication strategy to be utilized throughout the succession process.

Key Learning Points:

- An introduction to the “6-Step Communication Process.”
- Communication steps in identifying, assembling and preparing potential successors.
- Managing and communicating expectations to all stakeholders.



Presenter(s): Phil & Alyson

RECOGNIZING HUMAN MOTIVATION AND INDIVIDUAL PEAK PERFORMANCE

PHASE 1, SESSION 3 / April 30, 2024 / 9:00AM — NOON

Audience: Top Executive Leaders & Decision Makers PLUS Accompanying Successors

Description: In the world of banking and financial services, arguably every organization's greatest competitive advantage is the predictable, day-in-day-out performance of its team members. Introducing significant organizational change often complicates a leader's ability to recognize and predict the mindset and future performance of team members. Thus the ability to understand human motivation and peak performance during periods of change is a major asset to leading succession efforts and individuals.

In this session involving both executives and potential successors, a clear-eyed examination of the motivation behind succession will be undertaken. Successfully predicting the physical and emotional processes involved with succession can introduce a heightened state of efficiency, accountability, commitment and loyalty to the organization going forward.

Key Learning Points:

- Discover how to effectively serve the needs of today's new breed of employees during change, transition and succession.
- Learn the 2 motivational truths at the heart of employee succession.
- Clarify leadership and team building concepts embodied in motivation, influence and even manipulation.



Presenter(s): Phil & Alyson

ENGAGE, EMPOWER, EXECUTE

PHASE 1, SESSION 4A / April 30 - 1:00PM — 4:00PM

Audience: Top Executive Leaders & Decision Makers Only

Description: The first key to any well-developed plan is the intentional and effectual communication of that plan to those involved in it. The second key, equal in importance to the first, is the committed execution of that plan. Since employee succession is not based on one singularly correct approach, multiple means and methodologies will be explored.

This interactive session led by Phillip Van Hooser is specifically designed to involve executive group discussion regarding the execution of varied succession plans. Multiple succession plans will be highlighted within the group for the purpose of sharing and fine-tuning collective efforts.

Key Learning Points:

- The “dos and don’ts” of employee succession.
- Practical steps for employee empowerment at any level.
- A template for process implementation.

ELEVATE LEADERSHIP STANDING THROUGH RESULTS

PHASE 1, SESSION 4B / April 30 - 1:00PM — 4:00PM

Audience: Successors Only

Description: The best way to succeed as a successor within any organization is to deliver consistently high level results for the organization. Knowing the performance expectations, the timelines, the resources available, etc., are all critical to successful longterm performance.

In this presentation, Alyson Van Hooser will present successors with practical guidelines for establishing executive presence and purpose, communicating ideas efficiently and, building healthy team alliances.

Key Learning Points:

- 5 Key questions for leading effective meetings.
- 5 Steps for effective performance coaching.
- Dos and don’ts of effective counseling.



Presenter(s): Phil & Alyson

THE 10 C'S OF TEAM AND CULTURE BUILDING

PHASE 1, SESSION 5 / May 1, 2024 / 8:00AM — NOON

Audience: Top Executive Leaders & Decision Makers PLUS Accompanying Successors

Description: Trust, respect and loyalty are not built in one-off experiences or in some haphazard way. Instead, the necessary elements that build and bind strong relationships over time are forged by way of consistent day-to-day actions and interactions. As current and future leaders of the organizations you represent, it's your responsibility to create not only sustainable businesses, but those that are irresistible as well. Irresistible for employees, customers and clients, and stakeholders at every level.

In this shared session, the objective is to identify and elevate awareness of everyday moments that build and compound over time to establish the reality of your desired team culture.

Key Learning Points:

- The critical relationship between conflict and confrontation.
- Moving past cooperation in pursuit of organizational collaboration.
- The flexibility necessary to create cohesive cultures.



Presenter(s): Phil & Alyson

EXECUTIVE THINKING & PLANNING

PHASE 2, SESSION 1 / JUNE 12 – 9:00AM — 4:00PM

Audience: Successors Only

Description: Bearing the weight of executive authority and decision-making responsibility can be a daunting task. Yet, those thoughtful executives who carefully create and implement strategic business plans can be expected to realize ever greater levels of success. Certainly greater than those reckless individuals who, rather than plan, prefer to “fly by the seat of their pants.” Learning and mastering foundational strategic planning processes is a tremendous first step toward developing continuing excellence in executive performance.

In this successor-only session, participants will be challenged to expand their understanding of how to embrace and manage organizational resources from a uniquely executive perspective. This session is designed to evaluate organizational resources from an executive perspective.

Key Learning Points:

- Recognizing and embracing key executive resources, functions and responsibilities.
- Practical steps in creating executive purpose, presence and personal advantage.
- 2 Key approaches to successful, strategic business planning.
- 4 Strategic questions every executive must know — and ask.



Presenter(s): Phil & Alyson

EXECUTIVE DECISION MAKING

PHASE 2, SESSION 2 / August 14, 2024 / 9:00AM — 4:00PM

Audience: Successors Only

Description: High-performing organizations thrive under the capable direction of confident decision-makers. Ascending to increasingly higher levels of executive responsibility requires being able to identify, decide and capitalize on key business opportunities and obligations. Competently deciding in the midst of competing information, alternatives and voices — while the pressure builds — is not only an executive requirement, but a learned skill.

In this session, the decision-making awareness of participants will be elevated. Decision-making instincts will be challenged. Decision-making confidence will inevitably grow. A deep dive into executive decision-making can help avoid unnecessary awkwardness, hesitancy and ultimately, unnecessary decision making mistakes.

Key Learning Points:

- Exploring self-evaluation and “personal commitment” decisions
- 3 Phases of decision-making
- Deciding to avoid common leadership hurdles
- Decision-making “red flags”
- Degrees of executive decision-making



Presenter(s): Phil & Alyson

EXECUTIVE COMMUNICATION

PHASE 2, SESSION 3 / OCTOBER 2 - 9:00AM — 4:00PM

Audience: Successors Only

Description: Yet another of the ongoing challenges executives face is, in addition to planning and decision making, is the skillful ability to communicate those plans and decisions in such a way as avoid confusion and frustration. Effective executive communication not only allows a sharing of necessary information in a most appropriate way. It does so in a way that captures attention, builds connection and compels others to move forward together. Loyalty and trust are built over time on the foundation of effective executive communication.

In this session, the spotlight will shine on helping participants build an appropriate executive presence through the effective use of communication. Proven tools and techniques will be offered to support intentional communication through daily interactions with team members regardless the role, responsibility or position.

Key Learning Points:

- Recognizing and embracing key executive communication responsibilities.
- 4 Strategic questions every executive must ask.
- Practical steps in creating an executive purpose, presence and personal advantage.
- Listening objectively to options, without undue emotion.
- Using effective meetings to communicate executive plans.



ALYSON VAN HOOSER

**AUTHOR OF INFINITE INFLUENCE AND LEVEL UP AND INSPIRATIONAL
SPEAKER ON LEADING IN THE FUTURE OF WORK**

Alyson is on a sold-out mission to help leaders succeed in the complex, post-pandemic workforce!

As President & CEO of Van Hooser Associates Inc., and as a trusted authority and resource for effectively leading people, Alyson uses her management experience with Walmart, her leadership experience in the financial industry, and her work as an elected city council member – all by the age of 26 – to relate authentically with the challenges leaders are facing.

Tough beginnings taught Alyson the radical power of an ownership mindset—one that transforms the trajectory of your life and helps you achieve audacious goals. Alyson's work reveals future-proof, practical, immediately actionable, strategies for captivating, connecting, and compelling people to move forward with you, whether it be customers or employees! Her results-obsessed inspiration guides people at all stages of their careers to make practical changes that drive real-life results!



PHILLIP VAN HOOSER

**AUTHOR OF LEADERS OUGHT TO KNOW AND WE NEED TO TALK,
AND HALL OF FAME SPEAKER ON AUTHENTIC LEADERSHIP**

A seasoned leadership expert, keynote speaker, and author, Phillip Van Hooser is passionate about developing intentional leaders who can effectively engage and empower their employees to deliver powerful results.

Early in his career, Phil realized that at the heart of any worthwhile success— large or small — was the influence and impact of individual leaders. Determined to be a leader who made a difference, he immersed himself in the study of leadership and developed a process that can help anyone be a more effective leader.

For over 35 years, he has shared this process with individuals and organizations around the world through keynotes, training programs, books, and strategic advising – with extraordinary results!

A Hall of Fame keynote speaker and six-time author, Phil's unique conversational style and relatable storytelling captivate audiences while empowering them with the fundamentals they need to unlock their leadership potential and elevate others.

Whether delivering a keynote, conducting leadership training, or advising leaders, Phil's insight, candor, and experiential understanding of leadership have made him a trusted guide to any individual or organization ready to level up their leadership.