

History of Peer Group Banker Educational Sessions

2022 Quad Cities, IA and IL:

- Keynote Speaker: Greg Turner “Banking Trends”
- Keynote Speaker and Workshop: Dustin James “Create Everyday Excellence”
- Keynote Speaker: Haley DeGreve “Let's Talk about Mental Health: Thriving vs. Surviving”
- Partner Panel: Planning your regional tours
- PTO Speaker: Jim Edwards “Travel Trends”
- PTO Speaker: Anita Root “Constant Communication”
- PTO Speaker: Sherri Guiborat “Marketing Tips”
- PTO Speaker: Ted Nelson “How to Negotiate Ethically with Travel Partners”
- Open Mic

2021 Virtual:

- Banking Task Force Report: Using Social Media
- Travel Task Force Report: Promoting Travel Today
- Veterans Task Force: Navigating the HCI Website
- Keynote Speaker: Catherine Prather “Resiliency and the Changing Landscape of Packaged Travel”
- Keynote Speaker: Maria Vercimak “Self-Wealth: how to maximize your personal long-term profit through self-care”
- Keynote Speaker: Christian Leibl-Cote “Revenge is Sweet: North Americans plan their post pandemic splurges”
- Panel of Industry Leaders: Travel in 2021 Post Pandemic
- Open Mic

2020 Independence, MO:

- Keynote Speaker: Diana Ditto “Trends in Travel”
- Keynote Speaker: Mea Austin “Flourish” (personality assessments)
- Partner Itinerary Presentations
- Ask the Bankers (Facilitated by Kathy Bengtson, Amber Thomas & Renee Zaiser)
- Ask the Partners (Facilitated by Greg Maxon & Ezra Wood)
- Combined session of Open Mic & HCI Update (Presented by Ted Nelson)
- Banking Task Force Report: Non-Travel Bank Club Event Planning
- Travel Task Force Report: Naming and Marketing Tours
- “Simplifying Group Air Travel” (Presented by Ping Lee, Rick Pharr & Susan Rosenberry)
- “Travel Essentials: Packing & Planning” (Presented by Sherri Guiborat)
- “Why we value PTOs” (Facilitated by Amy Evans, Amber Thomas & Allison Whalen)
- Open Mic

2019 Sarpy County, NE:

- Keynote Speaker: Rita Paskowitz “Who Says You’re Not a Storyteller?”
- Keynote Speaker: Rita Paskowitz “Getting Your Story On”
- Banker/Partner Table Topics
- Keynote Speaker: Holly Wiest “Healthy on Tour”

- Banking and Travel Task Force Reports: Event Planning Guidelines, What To Do on a Motorcoach”
- “How to Negotiate with Travel Partners” (Presented by Ted Nelson)
- Keynote Speaker: Lucas Swartzendruber “Legal Review”
- HCI Update/Technology Task Force Report: Helpful Travel Apps, How to Whitelist
- Peer Panel: “Succession Planning”
- Open Mic

2018 Branson, MO:

- Keynote Speaker: Todd Parnell “Life is a River: Experiences in Leadership”
- Banking and Travel Task Force Reports: Travel Management Forms, How to Grow Bank Club Membership
- Keynote Speaker: Shawn Haygood “Energize Your Life”
- Banker/Partner Table Topics
- “How to Negotiate with Travel Partners” (Presented by Ted Nelson)
- Keynote Speaker: Mel Reed “The ONE Thing”
- HCI Update
- Travel Task Force Training: Excel Tour Planning Workbooks
- Open Mic

2017 Essex, VT:

- Keynote Speaker: Kim DuBrul “Linking Your Time with Your Happiness in Business and in Life”
- Banking and Travel Task Force Reports: How to Engage the Baby Boomer Market, How to Salvage a Trip with Low Numbers
- HCI Update & Veterans Task Force Report Mission Statement Update and Discussion of Logo Redesign
- Banker/Partner Table Topics
- Keynote Speaker: Janis Cooper “Unhappy Travelers in Your Herd”
- Baby Boomer Panel
- Networking Topics
- Open Mic

2016 Moravia, IA:

- Keynote Speaker: Randy Dean “Time Management: Handheld Devices”
- Keynote Speaker: Stevie Ray “Leadership at Every Level”
- Merchant Services: Manish Nathwani
- Banking and Travel Task Force Reports: Ideas and Resources for Bank Club Directors, Preparing for Travel Emergencies
- Banker/Partner Table Topics
- Keynote Speaker: Rob Bell “How to Wow-Teamwork”
- HCI Update & Veterans Task Force Report Mission Statement Update and Discussion of Logo Redesign
- Compliance: Linda Albrecht
- Open Mic

2015 Charleston, WV:

- Keynote Speaker: Dr. Ivan Muslin “Dealing with Difficult People”
- Task Force Reports: Managing Change through Acquisition & Competition or Partner
- Succession Planning Task Force - Panel Discussion
- HCI Working for You: Best Practices documents and discussion
- Keynote: Randy Dean, “Time Management”
- Best Practices review session
- Open Mic

2014 Laughlin, NV:

- Keynote Speaker: Jim Irwin, SPI “Reducing Financial Risk with Travel Insurance”
- Task Force Reports
- Keynote: Muriel Clark, Outback Nebraska “Social Media Success and Avoiding Common Pitfalls with Consumer Marketing Technology”
- HCI Business Session led by Ted Nelson “HCI Working For You to Protect Your Customers”
- Keynote: Randy Hellrung, ITMI “There’s An App For That”
- Ask the PTO Panel: Planning & Pricing with itineraries, comps, commissions, wholesale
- Open Mic

2013 Rapid City, SD:

- Keynote Speaker: Dee Dee Raap- “Making the Journey Great – Getting Started on the Right Foot”
- Task Force Reports: Surveying Membership and Ethics When Negotiating with Partners
- Banker/PTO Business Meeting
- Ask the PTO Panel: Handling Customer Pricing Objectives/How Retail Pricing Works
- Keynote Speaker: Vincent Kituku – “Moving Forward Without Leaving Life Behind”
- Banker Panel: Membership Categories & Criteria
- Ask the Partner Panel: “How to Assist Bankers in Marketing Travel”
- Open Mic

2012 Rogers, AR:

- Keynote & Workshop: Stacy Sporrer, Mills Financial Marketing – “Banking with the Boomers”
- Banking Task Force Workshop - “Proving Member Value – Reporting Tool for Management”
- Regional Peer Networks
- Keynote: Becki Drahota, Mills Financial Marketing – “Closing the Sale”
- HCI Business Session: Amy Countryman, Ted Nelson, Jon Gerlach
- Successful Succession Peer Panel
- Open Mic

2011 Dubuque, IA:

- Keynote Banking Speaker: John Sorensen, Iowa Bankers Association President/CEO
- Task Force Report
- Motivational Speaker: Brenda Clark Hamilton “Your Future’s So Bright... You Gotta Wear Shades!”

- HCI Business Session: Amy Countryman
- Fall Forum and Task Force Workshop:
 - Banking Task Force: Proving profitability/Best Practices Reporting document
 - Travel Task Force: Pricing tours properly and for profit – Trip Pricing (Excel) Worksheet
 - Fall Forum 2010: How to Increase Club Membership among 45-65 year olds. (Rory Roland)
- Open Mic
- Destination Resource Guide was handed out to bankers – showing bankers travel from the prior 2 years with PTOs. Purpose was to reach out to peers about their experiences to help in future travel considerations/planning.

2010 Oklahoma City, OK:

- Keynote Banking Speaker: Kell Kelly, Spirit Bank (Sapulpa, OK)
- “Ask the CVB” panel
- Keynote Speaker: Lyn Hester (Oklahoma City, OK) – “The Healing Art of Laughter”
- HCI Benefits: Amy Countryman
- Networking Workshop
- Open Mic

2009 Lafayette, LA:

- Keynote Banking Speaker: Tom Bengtson, NFR Communications– “Banking Industry Update”
- Networking Cracker-Barrel: “How to be successful in Today’s Economic Environment - Why this is the time to show your clubs value and strength.”
- Keynote Speaker: Megan Johnson, Generational Humorist “Zap the Gap”
- Networking Panel Discussions: “How creating regional peer groups can help to combat today’s challenges.”
- Keynote Speaker/Presenter: Cajun Karl, Cooking Demonstration and Cultural Enthusiast
- HCI Benefits: Amy Countryman
- Open Mic

2008 Minneapolis, MN:

- Keynote Banking Speaker: Karl and Jan Knock, Iowa State Savings Bank (Creston, IA) – “Dreams Realized”
- Leadership Seminar: Regina Barr, Red Ladder, Inc. (Minneapolis, MN) – “No Two Zebras Are Alike: How to Assess Member Needs to Engage/ Grow Membership.”
- Keynote Travel Speaker: David Clemmons – “VolunTourism.org”
- HCI Benefits: Amy Countryman
- Networking Workshop
- Open Mic

History of Peer Group Partner-only Educational Sessions

2019 Sarpy County, NE:

- HCI Update (Presented by Ted Nelson)

- Open Mic (Facilitated by Ezra Wood)

2018 Branson, MO:

- Understanding Bankers (Presented by Matt Galloway)
- HCI Update (Presented by Ted Nelson)
- Open Mic (Facilitated by Rick Pharr)

2017 Essex, VT:

- HCI Update (Presented by Ted Nelson)
- Open Mic (Facilitated by Rick Pharr)

Education Topic Ideas

Motivational/Educational

- How to keep motivated as a director when travel is down in numbers?
- Bank president keynote
- Professional planning – how to plan to lose your job? – legal vs ethical vs emotional
- Bank president keynote
- Public speaking for travel professionals
- Games and prizes
- Exercises (yoga and tai chi)
- Ice breakers for customer interaction
- Leadership development

Travel

- How to handle cancellations (policies) and customer conflicts
- Handling/planning for customer mobility concerns.
- How to address medical issues before, during and after a trip
- Working with CVBs
- Connecting PTOs and Partners
- What can suppliers do to motivate bankers to bring their group to them?
- The “state of travel” (Kent Van Roekel)
- How to book the best hotel
- What the bankers can do better for the PTOs
- Healthy snacks for coach/tours or extended travel
- Networking – Joining forces with other club directors
- Tour Directing 102 – (Ted Bravos)
- Tour directing responsibilities of 2nd person

Banking

- Marketing/Advertising – New ideas for promoting tours
- How to identify signs of struggle or health issues in the elderly
- Working with a ‘thinning’ staff at the bank. Efficiency tips and recruiting help ideas.
