

# 2024 Wisconsin State SHRM Conference Program

Updated 7.2.2024

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# Keynotes

## Creating Winning Cultures in the 21st Century

Speaker: Johnny C. Taylor, Jr.

Date: Thursday, October 10

Time: 8:15-9:15am

Location: Africa West and Africa 10-40

In today's fast-paced and ever-evolving business landscape, the pivotal role HR plays in shaping and nurturing organizational culture is unmistakable. The real challenge lies in effectively establishing the desired culture. Join Johnny C. Taylor, Jr., President and CEO of SHRM, for a fireside chat as he delves into the transformative power of HR in creating winning organizational cultures.

Johnny C. Taylor, Jr., is President and Chief Executive Officer of SHRM. Recently named one of the “Most Influential People Shaping Public Policy” in our nation’s Capital by the Washingtonian Magazine, Mr. Taylor’s career spans more than 20 years as a lawyer and an executive, serving at IAC, Paramount Pictures, Blockbuster Entertainment Group and the Thurgood Marshall College Fund, among other organizations. He is a member of the United Way Worldwide Board of Trustees and serves on the corporate boards of XPO Logistics (NYSE:XPO), Flores & Associates, and Guild Education. He previously served on the White House American Workforce Policy Advisory Board and as chairman of the President's Advisory Board on Historically Black Colleges and Universities. Mr. Taylor writes a weekly column in USA Today and is a Fellow of the National Academy of Human Resources and a SHRM Certified Professional.



## The Trust Edge<sup>®</sup>: How Top Leaders and Organizations Drive Business Results through Trust

Speaker: David Horsager

Date: Friday, October 11

Time: 8:15-9:45am

Location: Africa West and Africa 10-40

Trust is a fundamental, bottom-line issue. Without it, leaders lose teams, salespeople lose sales, and organizations lose reputation, retention of good people, relationships and revenue. But with trust, individuals and organizations enjoy greater creativity, productivity, freedom and results. Through David's industry leading research The Trust Outlook<sup>®</sup> and firsthand experience working with the world's highest performing organizations, David reveals how top leaders and organizations drive business results to become the most trusted in their industry.

David Horsager, MA, CSP, CPAE is the CEO of Trust Edge Leadership Institute, Global Trust Expert, Trust Expert in Residence at High Point University, Board member and Wall Street Journal bestselling author. David has advised leaders on six continents, from FedEx, Toyota, MIT, and global governments to the New York Yankees and the Department of Homeland Security.



## You're Mad. You're Stressed. You Might Be A Mess.

Speaker: Colene Elridge

Date: Friday, October 11

Time: 12:15-1:30pm

Location: Africa West and Africa 10-40

Buckle up for a refreshingly candid and utterly relatable keynote: "You're Mad. You're Stressed. You Might Be A Mess." In a world where chaos can sometimes feel like the new normal, it's time to embrace the real talk about those moments when frustration, stress, and a bit of messiness take center stage.

Led by an authentic and empathetic speaker, this keynote peels back the curtain on the universal experiences of navigating life's challenges. With a mix of humor, storytelling, and practical insights, we'll dive deep into the raw and human side of things – acknowledging that it's okay to feel overwhelmed at times. Get ready to explore strategies to transform those moments of chaos into opportunities for growth, resilience, and even a few well-earned laughs. Join us as we unpack the messiness, untangle the stressors, and discover the power within to embrace life's beautifully imperfect journey.

Colene Elridge, aka Coach Colene's decade-plus of HR experience, led to her being known as "the fixer"—she's called to help organizations and leaders create better workplaces, productive teams, and aligned results. Her career in government focused on Affirmative Action, EEO, and Diversity. She was a successful investigator of harassment and discrimination complaints and implemented strategies that resulted in more diverse and inclusive workplaces. She is the CEO of Be More Consulting, a boutique agency designed to support organizations in creating cultures of inclusion, and developing women leaders. Her first book, *Monday Morning Pep Talks*, was named by *Success Magazine* as a top book for professional women. Colene is the founder of EmpowHer Conference, a women's leadership event that focuses on building women into leaders both at work and in their lives.

Colene has a bachelor's degree in Cultural Anthropology from Transylvania University, where she currently serves on the Board of Regents, and an MBA from Sullivan University. She loves yoga, her family, movies, and laughing!



# Pre-Conference

## Peak Performance: Create Winning Cultures with Thoughtfully Fit Teams

Speaker: Jill Mueller

Date: Wednesday, October 9

Time 1:00-4:30pm

Location: A and B

Track: Inclusion and Belonging

Great teams don't just come together by chance; they're intentionally built. Managing a high-performing team in today's fast-changing workplace is similar to coaching a top sports team. You need more than just skilled individuals; you need a team that knows how to work well together to hit your targets.

This session will provide you with practical skills and strategies you can start using right away to help teams work better together. We'll look at different working styles and approaches that are key to success but can also lead to conflicts within even the most committed teams. Through hands-on activities, you'll learn how to recognize and use these differences to everyone's advantage.

Walk away with the tools to build a team culture where everyone understands their role and feels valued, turning your organization's teams into united groups ready to face any challenge.

- Learning Objective 1: Understand the importance of differences: Participants will understand the benefits of diverse work styles and learn how to manage conflicts arising from these differences.
- Learning Objective 2: Develop strategies for recognizing differences: Participants will learn to recognize, value, and appreciate differences in team members and take away tips to work with different styles.
- Learning Objective 3: Discuss expectations: Participants will learn how to facilitate discussions among team members about expectations for performance, communication, and accountability to create a shared understanding of team goals and how to achieve them.

JILL MUELLER, PCC, CPTD, M.Ed. (Master of Science in Administrative Leadership, Adult Education, Human Resource and Workforce Development at UW-Milwaukee) is the Vice President for Training and Learning Experiences at Darcy Luoma Coaching & Consulting. Throughout her career, Jill has worked in government, higher education, and college access. She received her Certified Professional Coaching Certificate from UW-Madison and is a Professional Certified Coach (PCC) with the International Coach Federation. Jill is also a Kolbe Certified Consultant.



Jill is a Certified Team Performance Coach through Team Coaching International and also completed the robust Organization and Relationship Systems Coaching (ORSC) training where she developed the tools and skills to help teams solve their people problems and become high-performing. Jill is passionate about creating engaging training and coaching experiences that challenge participants to consider new ideas, provide immediate takeaways, and incorporate a whole lot of fun.



## Transforming Team Communication: Discover Your Leadership Voice

Speaker: Skot Waldron

Date: Wednesday, October 9

Time: 1:00-4:30pm

Location: E and F

Track: Personal and Leadership Development

Everyone has a leadership voice, whether they know it or not. From the quietest to the most gregarious, we all have the ability to lead others. The problem is most people don't know their leadership voice or how to use it. Some don't know what it is, others are insecure in their voice and have been told it is unimportant, and others immaturely overuse their voice and dominate others.

Can you imagine a team of self-aware people who knew how to communicate and could bring their best to the table every day? What would that do for culture? For productivity? For profitability? In short, a lot.

Teams and whole organizations can be transformed when everyone operates securely in their own voice and learns to value the voices of others. When people don't use their natural leadership voice, here's what happens:

- Meetings seem to go nowhere
- Wasted time, money, and resources
- Misaligned teams that are ineffective or unhealthy
- Toxic work environment filled with drama and gossip
- People in the wrong role or position
- Disagreements that divide instead of unite

Break the norm and become a team that functions at more than 60% of its potential. Use the power of team development for sustained high performance.

- Learning Objective 1: Recognize the characteristics of each of the 5 Voices. Become more aware of your strengths and weaknesses and learn to apply them.
- Learning Objective 2: Identify your Foundational Leadership Voice and understand the "why" behind your communication style and that of others.
- Learning Objective 3: Commit to applying your Leadership Insights for immediate application. You will walk away with a plan.

With over two decades of experience, Skot has been the driving force behind enhanced communication strategies for premier organizations like J.P. Morgan Chase, the CDC, Georgia Tech, The Home Depot, and The Coca-Cola Company. He is the celebrated author of the Amazon best-seller, 'Unlocked: A 52-Week Guide For The Intentional Leader,' and the engaging voice behind the globally recognized podcast, 'Unlocked With Skot Waldron.'

Skot's expertise lies in transforming complex communication challenges into avenues for growth and development. His innovative, practical strategies have reshaped the landscape of effective leadership and team dynamics.

He believes your influence, your alignment as an organization, and your ability to execute effectively all begin with you, and how you communicate.

Skot unlocks people through little ah-ha moments that bring BIG transformation.



## Inclusive Talent Systems

Speakers: Amy Kesling and Stephanie Muñoz

Date: Wednesday, October 9

Time: 1:00-4:30pm

Location: G and H

Track: Talent Acquisition and Retention

Companies with culturally diverse leadership teams outperform less diverse peers by 36%. Yet many companies struggle to hire and retain a diverse workforce. An effective strategy with a knowledgeable HR team can disrupt cycles of inequities to move the organization confidently into the future. Attendees will learn how to break down patterns of bias, identify the impact of bias within the talent cycle, and identify strategies to shift organizational processes to support equitable outcomes. This workshop involves group learning, personal reflection, small group activities, and opportunities for real-world application.

- Learning Objective 1: Recognize patterns of bias within the systems and culture of your organization.
- Learning Objective 2: Own your role through practicing emotional intelligence.
- Learning Objective 3: Disrupt biases contributing to inequitable outcomes by applying new skills and perspectives within your positions of influence.

Amy is a founding partner of Step Up: Equity Matters, currently leading Learning & Development to help leaders at all levels work toward a more inclusive and equitable future. As a coach and facilitator, Amy connects with participants with humility and humor. She is a Six Seconds certified EQ Coach.

Stephanie is a strategy-focused facilitator that drives change by bringing people together and metamorphosing thoughts into action. She builds trust through curiosity, optimism and collaboration. Stephanie graduated from UW-Madison's Master of Social Work program and has worked within local government and nonprofits to develop and evaluate programs and policies.



## The Annual Legal Update from Boardman Clark

Speakers: Brian Goodman, Storm Larson, Jennifer Mirus

Date: Wednesday, October 9

Time: 1:00-4:30pm

Location: Africa West

Track: Employment Law and Legislation

This year's legal update will include three presentations. Storm Larson will present "2024 Legal Update in Employment Law" during which attendees will receive an overview of new and important developments in HR law. This presentation will update attendees on legal trends and developments so their workplaces stay ahead of the curve.

Jennifer Mirus will present: "Key Issues in Wage and Hour Law." Wage and hour issues are not often given high priority until a problem arises. However, they can cause significant liability. This program will review key issues in wage and hour law including overtime exemptions and the salary basis test, break and meal time, issues with remote work, and more. The program will be a valuable refresher and help attendees identify potential gaps in their wage and hour practices.

Brian Goodman will present "Conducting Appropriate and Effective Workplace Investigations" covering how to investigate general misconduct complaints, bullying complaints, and discrimination/harassment complaints consistent in a legally complaint manner. This presentation will also cover how to distinguish these types of complaints from general performance concerns.

- Learning Objective 1: To understand recent developments in HR law and how to stay legally compliant in the workplace.
- Learning Objective 2: To understand the legal parameters governing workplace investigations, including for discrimination/harassment complaints.
- Learning Objective 3: To understand how to proactively identify and remedy wage and hour issues before legal complaints are filed.

Brian P. Goodman is an attorney and a member of the labor and employment and school law practice groups of Boardman Clark. He assists employers with a wide range of legal issues including, hiring, discipline, terminations, leave issues under the Family and Medical Leave Act (FMLA), accommodation issues under the Americans with Disabilities Act (ADA), and many other day-to-day matters. Mr. Goodman is a frequent writer, presenter, and trainer on employment law matters.

Storm Larson practices primarily in the area of labor and employment law. He takes a practical approach in counseling employers on how to resolve problems before they escalate, but is unafraid to litigate when conflict cannot be resolved absent court intervention. Storm regularly appears before agencies as well as state and federal courts to advocate for his clients.

Doug Witte, a partner with Boardman Clark, has over 35 years of experience representing private and public sector employers in all aspects of labor and employment law. He has extensive experience in advising employers on wage and hour, employment discrimination, ADA, FMLA, and day-to-day personnel problems. This includes advising employers on union issues, including secondary boycott matters, picketing and reserved entrances, union organizing campaigns, “salting,” handbilling, and bannering; defending employers in NLRB representation and unfair labor practice proceedings; and representing public and private employers in collective bargaining negotiations and contract administration issues including grievance and arbitration proceedings. Doug is a frequent speaker to employer associations on a variety of labor and employment issues.





# Early Bird 1

## Wait...feedback IS development?

Speaker(s): Tanya Hanson and Aubree Martin

Date: Thursday, October 10

Time: 6:15-7:15am

Location: E and F

Track: Personal and Leadership Development

We are bombarded with messages that employees are expecting their managers and organizations to grow and develop them. There are a lot of frustrated employees out there saying that their managers and companies are not growing and developing them. There are a lot of frustrated managers out there saying all they do is give feedback. On top of that, there are a lot of organizations providing robust feedback tools to managers and employees. So where is the disconnect? We will discuss how to bridge the gap and create understanding of how feedback IS development.

- Learning Objective 1: Understanding what feedback is and looks like-in action. Specific feedback tools and examples will be provided.
- Learning Objective 2: How to create a space for feedback to be given and received.
- Learning Objective 3: Creating accountability around feedback, so that it becomes development.

Tanya is passionate about employee engagement, the employee life cycle (recruitment to alumni), compensation, building strong relationships & developing great leaders. She cares about people, strive for collaboration & team work and embrace the dynamic journey of a innovative organization.

She loves to dig in and navigate through the uncertainty with passionate and creative teammates. This is where the magic truly happens.



## Overcoming 5 Difficult Situations in Workplace Investigations

Speaker(s): Phillip Spearo

Date: Thursday, October 10

Time: 6:15-7:15am

Location: G and H

Track: Employment Law & Legislation

To reduce potential liability, HR teams must be able to conduct prompt, thorough, and impartial workplace investigations. This session examines and provides solutions for the five most difficult situations HR teams face in conducting a proper investigation. We will also discuss how AI can support a proper investigation.

- Learning Objective 1: HR teams will be able to overcome internal pressures that could jeopardize HR's obligation to conduct an impartial workplace investigation.
- Learning Objective 2: HR teams can confidently determine if an investigation is needed and be able to select the right investigator to ensure a prompt, thorough, and impartial investigation.
- Learning Objective 3: HR teams will be able to complete investigations at least 25% faster using emerging generative AI to ensure a prompt investigation and to start the workplace restorative process faster.

Phillip Spearo is a licensed workplace investigator, and a former attorney and HR leader. Phillip also leads the Association of Workplace Investigators Wisconsin Circle.

## Paving the Path to Success: Navigating the Journey to Obtain Your SHRM Certification.

Speaker(s): Kortney Jenks

Date: Thursday, October 10

Time: 6:15-7:15am

Location: Guava and Tamarind

Track: Personal and Leadership Development

In this engaging and insightful session meant for all levels of HR professionals, we will delve into the importance and process of obtaining a Society for Human Resource Management (SHRM) CP and SCP Certification.

- Learning Objective 1: Understanding what the SHRM Certifications are and the structure of the exam
- Learning Objective 2: Business Case for Why SHRM Certification is valuable to your organization
- Learning Objective 3. Local chapter support & learning courses available and tips and tricks from local chapter certification leaders on how to prepare for the exam

Kortney Jenks has been in the Human Resources field for 15 years in a variety of industries and Human Resource functions. She received her Bachelor's Degree in Business Administration with a concentration in Human Resources Management from the University of Wisconsin-Green Bay. Kortney received her SHRM-CP certification in December 2016.

Kortney currently works at the City of Oshkosh in Oshkosh, WI as their HR Generalist. In her role she supports recruiting, wellness, training and strategic planning. She currently serves on the Evergreen Community Foundation Board and is also the Certification Director for the WI SHRM State Council. Kortney strives to continue her learning and growth in the HR Profession.

# Learning Session 1

## How To Increase Capacity Without More Adding Time, Money, or People

Speaker(s): Skot Waldron

Date: Thursday, October 10

Time: 10:15-11:30am

Location: 1 and 2

Track: Business Acumen and HR Strategy

Learn how to do more with less. A lot of businesses are learning to do more with less. But that doesn't mean we can't still be effective and efficient.

Cutting back on staff?

Cutting back on budgets?

Cutting back on materials?

Cutting back on production?

Just want to do more with what you have?

In this session, attendees will learn the secret to creating more capacity with your current resources and doing more with less. This framework applies to any organization, big or small, hurting or not.

- Learning Objective 1: Understand the 5 critical components to an efficient team.
- Learning Objective 2: Learn 5 tools to help optimize performance.
- Learning Objective 3: Assess where you currently are and how to improve.

With over two decades of experience, Skot has been the driving force behind enhanced communication strategies for premier organizations like J.P. Morgan Chase, the CDC, Georgia Tech, The Home Depot, and The Coca-Cola Company. He is the celebrated author of the Amazon best-seller, 'Unlocked: A 52-Week Guide For The Intentional Leader,' and the engaging voice behind the globally recognized podcast, 'Unlocked With Skot Waldron.'

## Beyond the (k): Using Nonqualified Plans to Recruit, Reward, and Retain Key Employees

Speaker: David Cox

Date: Thursday, October 10

Time: 10:15-11:30am

Location: 3 and 4

Track: Total Rewards

Most people are familiar with qualified plans like the 401(k). According to a recent study from Vestwell, 85% of respondents expect an employer to offer retirement benefits.

- Learning Objective 1: NQ basics: Participants will leave the session with an understanding of what nonqualified plans are, and how they function.
- Learning Objective 2: NQ strategies: Through case studies, participants will learn applications for NQ plans, and how they be designed to support company goals, and their efforts to recruit, reward, and retain key talent.
- Learning Objective 3: NQ due diligence framework: We will provide participants with a framework for ensuring compliance with applicable laws and regulations. Participants will also walk away with best practices.

David serves clients as an executive benefits consultant. He has partnered with hundreds of employers to implement, monitor, and enhance their retirement plans. As a trusted advisor, David brings a deep knowledge of both qualified and nonqualified plans, and the rules and regulations that govern them, along with an expansive network of professional contacts to support his clients.

## The Nearly Impossible Task of Eradicating Gossip at Work

Speaker: Dave Schwallier

Date: Thursday, October 10

Time: 10:15-11:30am

Location: 5 and 6

Track: Inclusion and Belonging

In this knowledge sharing session, we delve into the intricate landscape of workplace gossip and grapple with the formidable task of eradicating it. Through an interactive and discussion-based format, participants will gain insights into the origins of workplace gossip, its subtle manifestations, and the profound impact it can have on organizational dynamics.

- Learning Objective 1: Understand the origins of workplace gossip and examine the impact on organizational culture, team performance, and individual well-being.
- Learning Objective 2: Learn the psychological underpinnings of office gossip, including social dynamics, power structures, and communication patterns. Understand how to identify specific causes in your organization.
- Learning Objective 3: Walk away with actionable strategies to implement in your organization to establish transparent communication strategies and practical approaches to create a gossip-resistant workplace culture.

Dave Schwallier is a coach, trainer, and consultant with LIFT Consulting, who has worked with dozens of executive teams, managers and HR leaders to navigate change, improve teamwork, and drive accountability within their organizations. Dave uses the power of story to reinforce points and provides a practical step-by-step framework and tools to help leaders get started.

## Fuel the Fire: Transforming Employee Engagement in the Digital Age

Speakers: Tricia Shields and Claire Frankiewicz

Date: Thursday, October 10

Time: 10:15-11:30am

Location: 7 and 8

Track: HR Technology

This insightful presentation delves into innovative strategies for enhancing employee engagement within contemporary workplaces. In this digital era, we explore multifaceted approaches focusing on events, activities, wellness initiatives, corporate communication, and much more! These strategies can help to ignite and sustain the flame of employee motivation, and ultimately build positive company culture. Attendees will gain valuable insight into leveraging technology to build an interactive, inclusive, and innovative engagement experience for ALL employees. “Fuel the Fire” is a must-attend for organizations seeking to optimize employee engagement in the digital landscape.

- Learning Objective 1: Understanding employee motivators and values.
- Learning Objective 2: Developing innovative strategies that align with motivators and values.
- Learning Objective 3: Leveraging technology to build interactive and engaging programming.

Tricia Shields, Chief Human Resources Officer at Naviant, brings 20+ years of human resources expertise. Throughout her career, she has witnessed HR professionals across industries confront similar challenges: endless needs and a shortage of time, all while their roles continue to evolve rapidly. The answer: Adaptability and an innovative embrace of technology. Since leading her own HR department’s digital transformation, Tricia has been on a mission to inspire other HR professionals to use technology in new and different ways.

Claire Frankiewicz is an enthusiastic HR Coordinator with a passion for crafting an exceptional employee experience & fostering corporate branding. A recent graduate of Edgewood College in May 2023, she embarked on an exciting journey to Naviant to kickstart her professional career.

## The Missing Piece: Understanding People & Productivity through Conation

Speaker: AJ Kruse

Date: Thursday, October 10

Time: 10:15-11:30am

Location: A and B

Track: Talent Acquisition and Retention

There's something missing from the productivity conversation in our workplaces, and it has to do with how we understand one another. We tend to see people in terms of their cognitive traits (their knowledge and experience) as well as their affective qualities (their emotions and beliefs) ... but that only accounts for two parts of a person's mind. There's another way to understand people and it's completely separate from how we think or what we feel – there's a third part of our minds. This session will introduce attendees to Kathy Kolbe's research on the conative part of the mind, the innate drive within all of us to take action and solve problems in our own unique way. This session will illustrate the importance of conation in understanding people and productivity and answer the question, "Why do people need to be free to do things their way?" (And what happens when they are not?) Explore the implications of understanding all three parts of the mind, and how that understanding can be used by managers and employees to reduce stress and burnout, strengthen relationships and foster greater productivity in the workplace.

- Learning Objective 1: Participants will leave with an understand of the conative part of the mind, its function and how it differs from other mental functions through the research of Kathy Kolbe.
- Learning Objective 2: Participants will explore the implications of conation to the workplace and its usefulness for reducing stress and burnout as well as strengthening collaboration and productivity.
- Learning Objective 3: Participants will define the connection between conation and specific talent practices that optimize performance and ensure role alignment within a workplace.

AJ needs to make things make sense, not only for himself, but for you as well. This quality, along with his knack for joining backstage design and front stage presentation has guided him through a dynamic professional career that began in elementary education and has continued in organizational development. After making the leap to corporate education, AJ led learning & development at two Milwaukee area businesses before embarking with three remarkable colleagues to launch humanworks8 in 2019.

## Active Threat Preparedness

Speakers: Drew Moldenhauer and Rich Webb

Date: Thursday, October 10

Time: 10:15-11:30am

Location: C and D

Track: Wellness and Safety

This session will provide public and private entities with active threat and preparedness training. The focus will be on improving safety and security, preparing to handle external or internal threats, and teaching rapid response techniques using situational awareness. Basic and easy-to-remember skills will be taught on how to survive an encounter. Through case studies, the learner will be able to learn from past events on what has worked and what has not worked. These tools will empower employees to feel safe at their workplace.

- Learning Objective 1: Threat Assessment- Attendees will see an example of a Threat Assessment at a facility which will include photos, identifying a safe meeting location for staff members, and customized safety tips specific to the facility. Vulnerable points and fatal funnels will be talked about and how to avoid these locations.
- Learning Objective 2: Surviving an Active Threat- Attendees will learn best practices for surviving an active threat situation: Basic and easy-to-remember skills will be taught to survive an encounter. Using case studies, attendees will learn what has worked and what has not from past active threat events. Attendees will learn about an active threat's common motives and ideologies and how to identify warning signs and proper paths for intervention, including de-escalation.
- Learning Objective 3: Situational Awareness- Attendees will learn how to read a potential attacker's body language and assess verbal and non-verbal cues and clues. De-Escalation and Prevention- Attendees will learn how to de-escalate a situation when someone becomes irritable and irrational. Attendees will learn keywords to avoid in certain situations and how to help someone calm their irrational behavior.

Drew Moldenhauer has 17 years of Law Enforcement experience with two police organizations in Minnesota. He holds a Master's Degree of Science in Public Safety Executive Leadership from St. Cloud State University. Drew is a Master Instructor in Situational Awareness and has a passion for training his clients in this very important subject. He recently just finished publishing his first book, "How Smart Police Officers Use Situational Awareness to Improve Safety". He owns and operates Blue Ethos Specialized Training.



## Leveraging AI & FinTech Solutions to Transform Workplace Financial Wellness and Retirement Planning

Speakers: Erin Greenwald, Michael Collins, Joe Saari, Dave Mancl

Date: Thursday, October 10

Time: 10:15-11:30am

Location: E and F

Track: HR Technology

Finance is one of the biggest drivers of stressors in the workplace and, admittedly, one of the factors that determine employee engagement and productivity. For Wisconsinites, 2023 was a good year economically. The state's unemployment rate is low, and wages are rising. Yet, one in four Wisconsinites say they need help to pay their basic expenses. Renters, low-wage workers, and younger people face more challenges, making it no wonder some feel like they cannot afford to save for retirement or pay for basic health insurance.

Most employers feel the need to help their employees prepare for retirement, helping to reduce the anxiety, lack of clarity, or lack of financial planning that yields uncertainty around managing debt, paying for medical bills, saving for retirement, or children's education. By providing tools like financial wellness and retirement savings options, organizations can give employees the knowledge and information to reach their financial goals confidently. Those mechanisms in today's modern workforce should include financial tech and AI-driven solutions. According to industry experts, Generative AI is already impacting financial wellness tools, but in coming years, it's likely to have a more significant role in retirement saving and wealth management.

Financial stress is a massive component of workplace wellness, closely linked to mental and physical well-being. Poor financial habits or circumstances culminate in mental stress and poor healthcare outcomes. These, in turn, contract employee engagement and productivity, which means employers need to refocus wellness strategies to improve financial well-being as a function of overall wellness.

- Learning Objective 1: Hear from industry experts as they present extensive research and survey data from the University of Wisconsin-Madison about national and state trends related to how your employees' financial wellness impacts your workforce.
- Learning Objective 2: This panel will explore essential strategies HR managers and business leaders can adopt to improve employee financial wellness in the ever-evolving corporate landscape by leveraging digital solutions and financial tech (fintech) products to provide personalized, AI-driven financial wellness tools that can help workers track spending, manage debt, and build their savings.
- Learning Objective 3: This panel will explore essential strategies HR managers and business leaders can adopt to improve employee financial wellness in the ever-evolving corporate landscape by leveraging digital solutions and financial tech (fintech) products to provide personalized, AI-driven financial wellness tools that can help workers track spending, manage debt, and build their savings.

Erin is an owner of Engauge Workforce Solutions and Rely Contract Manufacturing, both based in Milwaukee. Her companies work with thousands of individuals annually, many of whom are struggling with financial literacy and stability. She is a passionate thought leader on financial technology and helping people gain the knowledge and confidence to build secure financial futures.

J. Michael Collins is Professor of Public Affairs and Human Ecology where he is Fetzer Family Chair in Consumer and Personal Finance. Collins serves as Faculty Director of the University of Wisconsin–Madison’s Center for Financial Security. He is a faculty affiliate of the Institute for Research on Poverty and the Center for Demography and Ecology. His work includes studying financial capability with a focus on low-income families.

Joe Saari is a well-known thought leader who has been featured on CNBC, CNN, and Bloomberg TV; Joe brings over 20 years of experience as an academic, innovator, and leader in the field of financial wellness. Joe has dedicated his career to helping individuals improve their financial well-being and served on the Governor’s task force on financial Literacy.

David D. Mancl is the director of the Office of Financial Literacy at the Wisconsin Department of Financial Institutions and has over 20 years of experience in the financial literacy and capability field. He leads all financial literacy and capability issues in this position and manages the department’s related programs and initiatives. Mancl serves as Executive Director of the Governor’s Council on Financial Literacy and Capability.

## Use Your Behavioral Intelligence to Connect with Humans

Speaker: Kathie Rotz

Date: Thursday, October 10

Time: 10:15-11:30am

Location: G and H

Track: Personal and Leadership Development

If you are ever around people (family, co-workers, strangers), then this session is for you! During this fun, interactive learning session, you will be challenged to think differently about your behaviors and how you see others. You will walk away with at least one mind-changing idea, helping you connect and communicate at a deeper level, increasing your behavioral awareness.

- Learning Objective 1: Define behaviors using an informal DiSC model.
- Learning Objective 2: Ask two questions to define the preferred behaviors of other people, even strangers.
- Learning Objective 3: Adapt to other people's behavioral styles to create a connection while communicating.

In school, we learned what to think. When were you taught HOW to think? Kathie works with people who want to learn how to think differently so they'll be healthy and successful. As a speaker and coach, she challenges people to transform their thinking and behavioral habits to avoid being average.

## Principles of Persuasion: How to Increase Your Level of Influence

Speaker: Jeff Joutras

Date: Thursday, October 10

Time: 10:15-11:30am

Location: Guava and Tamarind

Track: Personal and Leadership Development

Let's face it, everyone is trying to influence somebody, everyday. In this presentation, attendees will learn the principles of persuasion, principles backed by research. Principles that are scientific, ethical and applicable. The science of persuasion is based on research by Dr. Robert Cialdini, who is considered the 'Godfather of Influence' and has worked with many influential companies including Google, Microsoft and Berkshire Hathaway. Oftentimes, increasing your level of influence comes down to minor changes that won't cost you anything or will only require a small investment. Learn how to move more people in your direction to achieve a favorable result-ethically. This will include examples for human resource professionals and managers who want to improve their level of influence within their organization in a practical manner. Understand the psychology of persuasion and create a specific action plan to improve your results!

- Learning Objective 1: An overview of the science and psychology of persuasion and how one can use decision triggers to move someone in your desired direction
- Learning Objective 2: The seven principles of persuasion that can be applied scientifically and ethically and how to activate and amplify the principles in any situation.
- Learning Objective 3: How to create a specific individual action plan to increase your level of influence.

Jeff Joutras is a founding member and Certified Coach with the Cialdini Institute for Ethical Influence as well as a Certified Coach, Teacher and Speaker with the Maxwell Certified Leadership Team. Jeff is also a trained DISC consultant helping individuals and teams identify their communication styles so they can better connect. Jeff lives in the Madison area, is married and the father of 5 adult children. He likes to golf and fish for the elusive musky and is a lifelong Chicago Cubs fan.

## Implementing Severance Decisions While Avoiding Expensive Litigation

Speaker: James Macy

Date: Thursday, October 10

Time: 10:15-11:30am

Location: Portia and Wisteria

Track: Employment Law and Legislation

Implementing employment terminations is an art. What you say and how you say it matters. Dignity matters. What you write and when you write it matters. This program will outline effective steps and strategies for implementing employment severance decisions with a goal to minimizing if not eliminating expensive litigation.

- Learning Objective 1: Learn the steps to take prior to implementing an employment termination and how to document those steps.
- Learning Objective 2: Learn how to run an employment termination meeting and how to document that meeting.
- Learning Objective 3: Learn the steps to take after the decision is made and communicated to the employee.

Jim is currently on the Board of Fox Valley SHRM as their Vice President - Legislation. He has practiced for over 30 years representing employers in a all aspects of employment law including labor negotiations, discrimination defense, ADA issues, wrongful discharge and other difficult personnel transactions. He speaks regularly on employment law topics on a national and statewide basis.

# Learning Session 2

## Rebuilding Connections: Navigating Conflict and Repairing Relationships at Work

Speaker: Sarah Noll Wilson

Date: Thursday, October 10

Time: 12:45-2:00pm

Location: 1 and 2

Track: Personal and Leadership Development

One of the most consistent and challenging situations HR leaders face is helping others navigate conflict and repair relationships. Together, we will explore the impact of unresolved conflict, strategies for navigating conflict, and methods for repairing connections. Sarah Noll Wilson will share examples from real teams who have applied these strategies and emerged stronger and more resilient than ever. Time won't heal all wounds, but a conversation can help!

- Learning Objective 1: Explore the hidden impact of unresolved conflict and avoidance.
- Learning Objective 2: Examine strategies for navigating conflict within teams and discover best practices for repairing relationships guided by real case studies.
- Learning Objective 3: Apply coaching strategies to use with team members and managers.

With 15+ years in leadership development, Sarah Noll Wilson earned a Master's Degree from Drake University in Leadership Development and a BA from the University of Northern Iowa in Theatre Performance and Theatre Education. Through her work as an Executive Coach, an in-demand Keynote Speaker, Researcher, Contributor to Harvard Business Review, and Bestselling Author of "Don't Feed the Elephants", Sarah helps leaders close the gap between what they intend to do and the actual impact they make.

## Raising the Bar with Career Development at American Family

Speakers: Stacy Bresser and Taura Prosek

Date: Thursday, October 10

Time: 12:45-2:00pm

Location: 3 and 4

Track: Personal and Leadership Development

American Family recognized a need for career development solutions based on employee data and market insights. Join us to learn how our talent development team built our business case, gained sponsorship, created a project plan, designed a career curriculum that aligns with our culture, and offered a career toolkit available to employees 24/7. Stacy Bresser from American Family and Taura Prosek from Stewart Leadership will share how their organizations partnered together to design a Career Compass program, including interview skill preparation, allowing employees to identify their interests, acknowledge their skills, align with a career goal, and prepare to achieve it!

- Learning Objective 1: Identify the value proposition for your organization to support (or not!) the implementation of career development solutions.
- Learning Objective 2: Learn American Family's 4-part "Pathway to a Purposeful Career" as one example of a career development program and toolkit uniquely designed to align with organizational goals.
- Learning Objective 3: Receive an interview skills prep guide as a take-away to support your internal employees as they prepare for their next role with your organization.

Stacy Bresser is in leadership and professional development with the American Family Enterprise where she's invested almost 15 years of her career focused on talent management and development programs. She was a member of the core team responsible for designing, implementing, and facilitating career development programs accessible to all employees across the enterprise. Stacy is a trained facilitator and a graduate of UW-Stevens Point with a degree in business.

Taura Prosek, Career Strategist with Stewart Leadership, has a background in career development. She partners with organizations implementing career development solutions and has authored *Lead Your Career: A Step-by-Step Guide to Achieving Professional Fulfillment*. Taura is Gallup-Certified in Strengths, certified with ICF, MBA from Kellogg-Northwestern, and BBA from UW-Madison.

## Listen Better with Linguistics: Language Analytics for Culture Work

Speaker: Samantha Beaver

Date: Thursday, October 10

Time: 12:45-2:00pm

Location: 5 and 6

Track: Inclusion and Belonging

We've all heard that 'active listening' is the key to better leadership and workplace relationships. But the only strategy offered in service of becoming a more 'active' listener is to simply 'stop talking'. While this advice is necessary, it is not sufficient: what else can we be doing to make sure that we are truly listening to the voices of our employees?

- Learning Objective 1: Attendees will learn about "framing" and will be challenged by the speaker to "reframe" their understanding of both "language" and "listening".
- Learning Objective 2: Attendees will learn about linguistics and language analytics, including how to perform a simple linguistic analysis.
- Learning Objective 3: Attendees will learn about linguistics and language analytics, including how to perform a simple linguistic analysis.

Samantha Beaver is a linguist and the founder of Memra Language Services. She has adapted research techniques from the field of linguistics to develop a way to analyze ambient workplace communication, delivering nuanced insights into team dynamics, organizational culture, and people analytics.



## The Culture Continuum: Navigating Organizational Identity in a Remote Era

Speaker: Shari Simpson

Date: Thursday, October 10

Time: 12:45-2:00pm

Location: 7 and 8

Track: Business Acumen and HR Strategy

Explore 'The Culture Continuum' and master the art of maintaining a vibrant organizational identity in the remote era. This concise session unveils strategies to foster a unified culture and identity across dispersed teams. We'll dive into effective tools and practices that ensure every remote and in-office member feels valued and connected. Get ready to learn how to weave a strong cultural fabric that transcends physical boundaries, creating an inclusive, engaging work environment for all. Ideal for HR professionals aiming to champion a cohesive culture in a changing workplace landscape.

- Learning Objective 1: Understand the impact of remote work on organizational culture.
- Learning Objective 2: Explore strategies to maintain and strengthen culture remotely.
- Learning Objective 3: Discuss tools and technologies to facilitate cultural cohesion.

Please welcome Shari Simpson, a distinguished HR professional with over 17 years of experience in the field. Shari is not only an expert in training and development, talent acquisition, and employee relations but also a respected voice in the HR community as the host of the HR Mixtape podcast. Her academic achievements are notable, including an MBA, MHRM, and SHRM-SCP, and she is currently pursuing an EdD in Leadership and Innovation.

## Foster Inclusion for Healthy Conflict and Innovation

Speaker: Diana Pastrana

Date: Thursday, October 10

Time: 12:45-2:00pm

Location: A and B

Track: Inclusion and Belonging

Join Diana Pastrana, as she guides you in transforming your perspective on conflict dynamics and communication styles to enhance your team management skills and boost employee engagement. Explore the intricacies of diverse team dynamics and discover how fostering inclusivity can reshape conflict management. Whether you're an HR leader who shies away from discord or grappling with lingering issues within your core team, Diana will provide actionable insights to propel you in the right direction. Delve into the conflict quadrants and learn how to guide your team toward an ideal state, equipping them with techniques to enhance productivity and stimulate innovation.

- Learning Objective 1: Understand where conflict stems from on your team and how you engage with work based on your background, cultural values and life experiences.
- Learning Objective 2: Identify where your team "lives" in regard to conflict, innovation, and psychological safety in the workplace. Learn practical facilitation techniques on how to move to your ideal state!
- Learning Objective 3: Learn how to prepare for a hard conversation and help resolve conflict amongst your team. This session will teach you tools on how to assess and approach any conflict and come to resolution.

Diana Pastrana is the visionary and founder of Defyne, LLC, dedicated to helping organizations grow through conflict. With an impressive track record spanning over a decade, she has worked across diverse industries, honing her skills in cultivating more resilient and inclusive teams. Notably, Diana holds the Inclusion Institute Certified Diversity Practitioner (IICDP) designation and holds a certificate of Conflict Resolution from Cornell University.

## Emerging HR and Non-Traditional Apprenticeships to Grow & Retain Talent

Speaker: Chuck Olsen

Date: Thursday, October 10

Time: 12:45-2:00pm

Location: C and D

Track: Talent Acquisition and Retention

Wisconsin just achieved a state record of more than 16,300 apprentices during 2023 thanks to strong growth in traditional sectors and innovative opportunities in emerging non-traditional sectors such as HR, healthcare, logistics, education, information technology, facilities maintenance and more.

This presentation will help HR Managers learn more about the benefits of new apprenticeship programs. Unlike the traditional trade apprenticeships, most of the non-traditional apprenticeships are 12-18 months in duration. But most result in industry certification(s), and a nationally recognized journey-worker credential. Some even earn the apprentice a technical or associates degree. Wisconsin Registered Apprenticeship programs support apprentices, employers and your growth strategies.

The basic concepts of registered apprenticeship in our state has been existed since 1911 when Wisconsin became the first state in the nation to offer these "earn and learn" programs. Apprentices earn a progressive wage while learning an occupation. Employers grow their own skilled workforce.

Apprenticeship is a post-secondary education, like a college or university. But there's a big difference. Apprentices learn only a portion of their skills in a traditional classroom. They receive most of their training on-the-job as a full time employee, while working for an employer who pays a good wage. The employment is the primary requirement for an apprenticeship - a job must exist in order for the apprentice to be trained. The classroom instruction is usually provided through the Wisconsin Technical College system but it can also be provided virtually through a external provider such as Penn Foster, Relias and the SHRM Foundation.

Learn about grants and other state support programs that can help you take the next steps to apply for and implement a state approved registered apprenticeship in your organization.

- Learning Objective 1: Learn the specific occupations that are now approved state registered apprenticeship programs.
- Learning Objective 2: Learn about the HR Specialist Registered apprenticeship program which was launched at the December 9, 2022 WI SHRM Conference in December of 2022.

- Learning Objective 3: Learn about grants and other state support programs that can help you take the next steps to apply for, and implement a state approved registered apprenticeship that meets the needs of your organization.

Chuck Olsen has been with the WI DWD for the past two years. He works with state employers to develop registered apprenticeship programs in non-traditional occupations such as HR, IT, Health Care and ECE. Chuck received his BA and MBA from UW-Madison. Chuck served 20-years in the US Army, and later worked in the private sector for 20-years as a director with Ford Motor Company and the Boucher Group.



## Financial Education: Supplementing Existing Benefits Package with Information Employees Need Now

Speaker: Amy Crowe

Date: Thursday, October 10

Time: 12:45-2:00pm

Location: E and F

Track: Wellness and Safety

More than three-quarters of employees want financial wellness benefits from their employers but only 2 in 5 employers offer financial wellness programs . What's the disconnect?

Employer-sponsored retirement plans are the norm these days and many companies offer safety net insurance like life and disability policies. Yet, employees' assessment of their financial wellbeing is at an all-time low due to external factors like inflation and cost of living.

This session provides ideas for curriculum and learning opportunities employers can provide right now to address today's concerns. While long-term financial wellness is the goal, helping employees prioritize spending when money is tight or develop an emergency fund can immediately lower stress and lead to happier, more engaged workers.

- Learning Objective 1: Understand current market trends in employee financial wellness through data and case studies.
- Learning Objective 2: Determine ways that financial education benefits compliment existing employee financial benefits like salary, retirement plans, student loan repayment, etc.
- Learning Objective 3: Identify opportunities to supplement existing wellness offerings with financial wellness curriculum that specifically addresses current employee concerns like cost-of-living increases and inflation.

Amy Crowe, CEPF, is a personal finance expert with 25 years of experience in writing, speaking and educating about money. She is passionate about illuminating the connection between mindset and money behavior. Her lessons are meant to motivate and inspire action by empowering women to make breakthrough financial changes.

## Wait... You're Not Done With Your Organizational Restructure

Speaker: Jeff Chan

Date: Thursday, October 10

Time: 12:45-2:00pm

Location: G and H

Track: Business Acumen and HR Strategy

A recent study from McKinsey found that organizations restructure every 3-5 years and it takes organizations 1-2 years to implement a new structure. This means that most organizations are always in a state of flux - either planning for a restructure, in the midst of a restructure or recovering from a recent restructure.

Most organizations focus primarily on the organization chart as the primary focus of the restructure - who reports to who. As a result teams are left wondering questions such as How should they work differently in the new structure? What is changing in the new structure other than new reporting relationships? Why was this new structure implemented?

There's got to be a better way!

HR leaders can and should play a critical role in working with business and functional leaders to help them operationalize the organization restructure by aligning people, processes and culture.

- Learning Objective 1: Operating Model Design - Develop an operating model for your organization that operationalizes your business strategy and is the bridge to your organization design. The operating model provides a clear picture of how the organization will work to operationalize the strategy and business direction.
- Learning Objective 2: Organizational Alignment & Agility - Understand the 6 elements of organization design - structure, process, metrics, management processes, talent and culture and learn how to align these 6 elements to the strategy of your organization.
- Learning Objective 3: Change Management - Instead of the traditional "pushing" the change on the organization - learn how to create the "pull" - building the awareness and desire in managers and employees to embrace the organizational restructure and adopt new ways of working.

Jeff Chan is President of Chan Management Consulting. Jeff consults with leaders in the areas of Organizational Improvement and Transformation, Change Adoption & Acceleration, Strategy Development and Execution, Culture Change, Organization Design. Jeff is an adjunct faculty member at the University of Wisconsin Business School Executive Education program teaching and working with companies on Change Management and Organization Effectiveness.

## What Do Employees Want Most?

Speaker: Joseph Backus

Date: Thursday, October 10

Time: 12:45-2:00pm

Location: Guava and Tamarind

Track: Total Rewards

Employers are consistently wondering, "What do my employees want most?" Many of which, spend millions of dollars on total rewards - but cannot answer this question.

This presentation will break down how employers can first understand the level of perceived value from their staff, what employees value most, how to invest employer dollars properly with a strategic plan, and how to communicate any changes in strategy to their employee population.

- Learning Objective 1: Understanding Current State - In each category of Total Rewards (Direct Compensation, PTO, Retirement, Health & Welfare Benefits, Variable Compensation), how do I as an employer compare to industry, location, and size?
- Learning Objective 2: Understanding What Employees Value - Many employers just focus on benchmarking data to answer this question, but that does not truly capture the full picture of that specific employer's population. I'll describe how an employer can understand the perceived value for each category of Total Rewards.
- Learning Objective 3: Building a Total Rewards Philosophy & Implementing Changes Strategically (Proactively versus being Reactive) - Once the employer understands their current position and what matters most to employees. Then, it makes sense to realign (or in some cases establish) the Total Rewards Philosophy. Once this is completed, then a multi-year plan to make strategic adjustments leading to a competitive employer advantage.

Joey Backus, Vice President within Cottingham & Butler's Employee Benefits Consulting Services and has been on the team for 8 years. Joey serves as the Membership Chair at MMSHRM and is on this same committee for GMA SHRM. He focuses in on what employees truly value most, how employers can most effectively retain / attract talent, and how to best set up Employee Benefits to take care of people.



## Building a Dynamic Employee Value Proposition

Speaker: Susan Bailey

Date: Thursday, October 10

Time: 12:45-2:00pm

Location: Portia and Wisteria

Track: Total Rewards

Talent survey data indicates 75% of active job seekers are likely to apply for a job if the employer activity manages its employer brand and their company's Employee Value Proposition (EVP). Additional data confirms, organizations with a strong EVP have lower turnover and increased new hire commitments – addressing two of the most frustrating challenges facing employers today. A dynamic Employee Value Proposition is intentional and comprehensive in nature...capitalizing on the strengths of the organization and its purpose while providing benefits and resources that resonate with employees, enabling them to be productive and thrive. The stakes are high and so are employee expectations. This session aims to provide insight into steps an employer can take to create an EVP that helps to retain high-performing talent while solidifying and improving the relationship between employees and the organization.

- Learning Objective 1: Explain the business case for developing an Employee Value Proposition.
- Learning Objective 2: Describe the essential elements of a magnetic EVP.
- Learning Objective 3: Outline initial steps an organization can take to integrate EVP into talent attraction and retention strategy.

Susan Morgan Bailey is a high-energy leader with 25+ years of experience in health, benefits, and education. As SVP, Culture & Wellbeing Practice Leader at Marsh & McLennan Agency, she helps organizations build sustainable businesses through supportive cultures. Susan is a certified Deep Transformational coach, with a BS in education and an MS in health promotion. She is passionate about creating spaces for individual and organizational thriving.

## Learning Session 3

### A Year of Transformation: Harnessing Best Practices to Create a Coaching Culture

Speaker: Sarah Noll Wilson

Date: Thursday, October 10

Time: 2:30-3:45pm

Location: 1 and 2

Track: Business Acumen and HR Strategy

A coaching culture can have a profound impact on an organization's success by fostering employee development, improving leadership, enhancing communication, and creating a positive and adaptable work environment. It's an investment in the long-term health and effectiveness of the organization.

Together we'll explore the power of coaching cultures in driving progress and possibility in organizations. Discover how the fusion of coaching principles and best practices for learning can reshape your workplace culture, empower your teams, and drive sustainable growth. Through real-world case studies and expert guidance, Sarah Noll Wilson will inspire, equip, and motivate you to embark on a year-long journey of profound organizational change.

- Learning Objective 1: Explore the benefits of cultures that embrace coaching.
- Learning Objective 2: Examine multiple road maps used by organizations to jumpstart a coaching culture within one year.
- Learning Objective 3: Discuss best practices for adult learning that will supercharge organizational change.

With 15+ years in leadership development, Sarah Noll Wilson earned a Master's Degree from Drake University in Leadership Development and a BA from the University of Northern Iowa in Theatre Performance and Theatre Education. Through her work as an Executive Coach, an in-demand Keynote Speaker, Researcher, Contributor to Harvard Business Review, and Bestselling Author of “Don’t Feed the Elephants”, Sarah helps leaders close the gap between what they intend to do and the actual impact they make.

## Tribal Leadership

Speaker: Matthew Pletzer

Date: Thursday, October 10

Time: 2:30-3:45pm

Location: 3 and 4

Track: Personal and Leadership Development

When leadership teams are asked what they struggle with most, “accountability” often ranks near the top of their list. They are frustrated with the lack of commitment from their team or exhausted by the feeling that they must micro-manage to get results. This session will illuminate root causes and explore strategies to enhance organizational accountability for leaders. Embrace a path forward to foster a culture of commitment through Tribal Leadership.

- Learning Objective 1: Understand the common root causes of chronic accountability issues within leadership teams and organizations and identify the ones that your leadership team needs to overcome.
- Learning Objective 2: Explore methods to move away from micro-management towards a more collaborative and accountable leadership style. Learn effective strategies to foster commitment and engagement within a team.
- Learning Objective 3: Develop insights into building a culture of accountability within your organization and understand the role of leadership in sustaining that culture of commitment.

As a speaker, trainer, business consultant, and executive coach with LIFT Consulting, Jason Chance brings a proven track record in entrepreneurship and leadership. Having built a multimillion-dollar events business, Jason understands the challenges and opportunities that arise in today’s corporate landscape. With his high-octane facilitation style and results-driven approach, he helps audiences enhance their leadership and drive measurable impacts in their organizations.

## Creating Psychological Safety and Well-being for a Stronger Workforce

Speaker: Linda Golik

Date: Thursday, October 10

Time: 2:30-3:45pm

Location: 5 and 6

Track: Wellness and Safety

Our workforce has forever changed including quiet quitting, the great resignation, mental health concerns and more. Creating psychological safety is a deeper solution to address wellbeing in our organizations and Bellin Health is working to help employers understand the connection. This session will help you learn how a healthy culture leads to better retention, healthier employees, and greater engagement and profits and will give practical ideas on how to implement in your organization.

- Learning Objective 1: Define the psychological safety and why it impacts our workforce.
- Learning Objective 2: Identify practices and techniques to improve trust and safety in their own cultures.
- Learning Objective 3: Access Bellin Health's Free psychological safety program or get ideas to start their own.

As Bellin Health's - Linda Golik has over 20 years experience in multimedia and health and wellbeing. She is responsible for leading Bellin Health's Lifesaver Wellbeing Program, as well as an internal cultural change program called "Civilitas." You can see her on local news segments, at community events, on stage as a key note speaker, or on her two podcasts "Mental Health Moments" and "Prescription For Life."

## Unions on the Rise—An Update on Best Practices in Light of NLRA Developments

Speakers: Kevin Terry and Christopher Toner

Date: Thursday, October 10

Time: 2:30-3:45pm

Location: 7 and 8

Track: Employment Law and Legislation

Labor unions are on the rise. In an election year, and at a time when almost 70% of Americans “approve of unions,” we anticipate union organizing activity will continue in many organizations. Attorneys Christopher Toner from Axley Brynelson and Kevin Terry from Michael Best & Friedrich will review important cases issued by the National Labor Relations Board and discuss best practices for leaders faced with addressing increased union activity in their organizations.

- Learning Objective 1: Provide an update on cases issued by the National Labor Relations Act relevant to all employers.
- Learning Objective 2: Review tactics to determine whether your employer is at risk of union organizing campaign.
- Learning Objective 3: Review best practices for training supervisors to ensure compliance with the National Labor Relations Act.

Attorney Christopher M. Toner is a partner and member of the Firm’s Labor and Employment Practice Group. Attorney Toner has two decades of experience in representing employers in all areas of labor and employment. As a member of an HR team, he is a leader in providing practical advice to ensure compliance in all areas of the labor and employment law, including the National Labor Relations Act, Americans with Disabilities Act, Family Medical Leave Act, and federal and state discrimination laws.

Attorney Kevin Terry is a Partner in the Labor and Employment practice group of Michael Best & Friedrich in Milwaukee. Attorney Terry has been practicing labor and employment law his entire career, assisting private sector clients in health care, manufacturing, construction, retail and service industries. Attorney Terry’s practice centers on all matters arising under the National Labor Relations Act, including union organizing, unfair labor practices litigation, and collective bargaining.

## Seen + Heard + Valued: How Prioritizing Recognition Drives Engagement & Success

Speaker: Leah Roe

Date: Thursday, October 10

Time: 2:30-3:45pm

Location: A and B

Track: Personal and Leadership Development

At the heart of every thriving workplace is the fundamental human need for recognition - the desire to be seen, heard, & genuinely valued. When your employees feel recognized for their accomplishments & for who they are as people, that is when trust forms, engagement skyrockets, & unstoppable teams are built.

In this high-energy & high-impact workshop, we'll explore the art of recognition, a key trust-building behavior, & one that, when done well, can boost your eNPS (Employee Net Promoter Score) by 4x (Gallup). This workshop is designed to not only underline the critical importance of recognition in driving employee engagement, retention, & well-being but also to offer a deep dive into practical strategies for its application.

Through interactive discussions, personal reflection, & sharing of best practices, participants will discover their unique celebration styles & how to acknowledge others in a manner that resonates. Armed with practical tips & actionable strategies, you will be ready to implement authentic recognition techniques that foster a culture of trust, create meaningful connections, & promote a sense of belonging, leading to extraordinary outcomes in your team dynamics. Embrace the power of recognition to transform your leadership approach & witness the profound impact it has on your team's engagement & success.

- **Learning Objective 1: Understand the Psychological Impact of Recognition:** Participants will learn about the fundamental human need for recognition and its psychological impact on employees. The workshop will explore how being seen, heard, and valued contributes to building trust, enhancing employee engagement, and fostering team cohesion. Through interactive discussions, attendees will gain insights into the correlation between effective recognition and improved Employee Net Promoter Score (eNPS), as highlighted by Gallup research.
- **Learning Objective 2: Develop Personalized Recognition Strategies:** Attendees will engage in personal reflection and sharing of best practices to identify their unique styles of celebrating achievements and recognizing others. The workshop is designed to help participants understand the diversity of recognition preferences and how to tailor their recognition efforts to meet the individual needs and cultural contexts of their team members. This objective focuses on equipping leaders with the skills to implement recognition practices that resonate on a personal level and promote inclusivity.

- **Learning Objective 3: Implement Actionable Recognition Techniques:** The final objective is to provide participants with practical tips and actionable strategies for applying authentic recognition techniques within their teams. By the end of the workshop, attendees will be prepared to create a culture of trust, foster meaningful connections, and enhance a sense of belonging among team members. This will involve learning how to use recognition to not only acknowledge achievements but also to reinforce positive behaviors and values, thereby leading to extraordinary outcomes in team dynamics and overall organizational success.

Leah Roe is the Founder of The Perk: a premiere leadership & culture development studio. She's a Certified Leadership Coach, revered Organizational Trust Strategist, & dynamic Culture Consultant.

Leah's mission goes beyond coaching & consulting; she's here to empower you with the unwavering belief that anything is possible & to make you feel absolutely unstoppable. With a touch of her magic, she infuses fun, celebration, & a human touch into every facet of her work.

## Talent Optimization

Speaker: Marty Ramseck

Date: Thursday, October 10

Time: 2:30-3:45pm

Location: C and D

Track: Talent Acquisition and Retention

The challenge: With disengagement affecting more than 20% of the workforce, the cost of not optimizing your talent strategy can be staggering. It's estimated that a disengaged employee can cost a company \$3,400 for every \$10,000 of their salary. Now multiply that cost by 20% of your workforce, and you can see how it adds up. But while all CEOs have a business plan and most have a financial plan, how many have an intentionally-designed people plan that will allow them to achieve optimal performance.

Introducing talent optimization. Talent optimization is the missing link between business strategy and year-end results. By aligning business and people strategies, leaders are empowered to assemble the right teams and create environments that fire up employees to achieve tangible business results. It allows companies to intentionally, consistently, and strategically design cohesive teams and a culture that drives business results.

- Learning Objective 1: How to use people data to deliberately design its approach to leadership, culture, and team dynamics.
- Learning Objective 2: Defining the roles an organization needs and matching the right person to the requirements boosts the opportunity for success.
- Learning Objective 3: How to understand their employees, they are equipped to minimize conflict, reduce organizational toxicity, and communicate more effectively, letting distractions get out of the way of results.

Marty has cultivated 30 years of experience in hands-on sales management and double-digit growth in every one of his ventures. He has worked for companies such as Vintage Senior Living, LivHOME, Sunrise Senior Living, CORT, and Cigna.

An expert, who helps organizations intentionally design and implement a people strategy, building powerful teams and cultures to match their business strategies. He helps employees become more engaged, productive and satisfied by facilitating self-awareness and a



## Funding Healthcare—What's Right for You?

Speakers: Shay Sherfinski and Chris Kramer

Date: Thursday, October 10

Time: 2:30-3:45pm

Location: E and F

Track: Total Rewards

The healthcare landscape has changed dramatically over the last 10 years. A big part of this relates to the three main funding options employers have used for their healthcare plans (fully insured, self-funding, level-funded). The options within these funding types have grown significantly and there are more levers employers can pull to contain costs and enhance benefits.

In addition, other funding mechanisms have emerged. Employers should be educated on all the options when making decisions for their organization and employees.

This presentation will provide a deeper dive into the funding choices, considerations employers will need give thought to and potential impact on employees. Chris and Shay will incorporate real world examples into the presentation.

- Learning Objective 1: Outline the various funding types and discuss advantages and disadvantages of each.
- Learning Objective 2: Educate attendees on the choices within the funding types as well as the emerging carrier models employers could utilize (direct primary care, ASO, narrow networks, restricted formularies, etc.)
- Learning Objective 3: Examples of what other employers have implemented and their results.

Shay has been in the benefits consulting industry for a decade. Prior to joining the industry, she worked in business development/client service, at the Journal Sentinel and the Milwaukee Bucks. As an employee, she listened to presentations on benefits and did not understand the terms used or how benefits worked. She decided when joining the R&R team, her #1 priority was educating both employees and employers on their benefits. Shay has excelled at making the complex understandable.

Chris has over 30 years of experience in the benefits industry working with employers from 50 to 40,000 employees. He has over 20 years of HSA, HRA, and FSA design, administration, and education expertise. Chris has helped numerous clients maximize the value of tax-free accounts and effectively incorporate them into employer benefit programs. He also likes telling dad jokes.... sometimes he laughs!



## Maybe It's Me: Cultivating Self-Awareness At Work

Speaker: Colene Elridge

Date: Thursday, October 10

Time: 2:30-3:45pm

Location: G and H

Track: Personal and Leadership Development

Ever wondered why some days you're the office MVP, while others feel like you're stuck in a rut? That's where self-awareness swoops in like a superhero, helping you figure out your strengths, weaknesses, and everything in between.

In today's fast-paced professional environments, self-awareness is a critical skill that can significantly impact individual and team success. "Maybe It's Me" is a dynamic workshop designed to help participants explore and enhance their self-awareness within the context of the workplace.

Join us for some serious fun as we unpack what self-awareness really means and why it's your secret weapon at work.

- Learning Objective 1: Discuss emotional intelligence, understand your unique communication style, and uncover those pesky blind spots we all have.
- Learning Objective 2: Expect some hands-on activities, juicy discussions, and maybe even a few "aha" moments along the way.
- Learning Objective 3: Leave with practical tips and tricks to level up your game, boost team vibes, and strut your stuff like the workplace rockstar you are!

Colene Elridge, aka Coach Colene's decade-plus of HR experience, led to her being known as "the fixer"—she's called to help organizations and leaders create better workplaces, productive teams, and aligned results. Her career in government focused on Affirmative Action, EEO, and Diversity. She was a successful investigator of harassment and discrimination complaints and implemented strategies that resulted in more diverse and inclusive workplaces. She is the CEO of Be More Consulting, a boutique agency designed to support organizations in creating cultures of inclusion, and developing women leaders. Her first book, *Monday Morning Pep Talks*, was named by *Success Magazine* as a top book for professional women. Colene is the founder of EmpowHer Conference, a women's leadership event that focuses on building women into leaders both at work and in their lives.

Colene has a bachelor's degree in Cultural Anthropology from Transylvania University, where

she currently serves on the Board of Regents, and an MBA from Sullivan University. She loves yoga, her family, movies, and laughing!

## Pay Transparency: Moving Beyond Compliance to Strategic Advantage

Speaker: Megan Nail

Date: Thursday, October 10

Time: 2:30-3:45pm

Location: Guava and Tamarind

Track: Total Rewards

Are you struggling to keep up with rapidly changing pay transparency laws? Many cities and states now require publishing pay ranges on job advertisements, annual pay data reports including pay rates for race, ethnicity and sex within each job category, and disclosure of pay scales to current employees upon request.

Wisconsin is one of the latest states to consider a pay transparency law, so now is the time to be informed and develop your strategy!

Beyond compliance with the new regulations, are you ready for the impact on your current and prospective employees? This session will help you not only understand the current pay transparency landscape and how it affects you, but give you tangible ways to make transparency a competitive advantage.

- Learning Objective 1: Understanding of the current pay transparency laws and landscape and how they impact you.
- Learning Objective 2: How to create a transparent compensation strategy that aligns with your organization's values and goals.
- Learning Objective 3: Strategies, tools and resources to create a pay transparency roadmap and plan for your organization.

As Vice President, Total Rewards Practice at NFP, Megan provides expert guidance to clients, helping them to align their organization's goals with effective total rewards and compensation strategies. She specializes in designing market competitive compensation frameworks that support the organization's specific needs and philosophy, ensuring they are practical to implement and use. With nearly 20 years' experience as a volunteer leader at the Society for Human Resource Management (SHRM), including serving at the highest level of national SHRM volunteer leadership, Megan has invested in building and strengthening the HR community. Megan has her Master of Science in Organizational Communication from Purdue University and a Bachelor of Arts from the University of Dayton. She also possesses professional certifications including Certified Compensation Professional (CCP), Certified Employee Benefits Specialist (CEBS) and SHRM-SCP.



## Role of Recruiters in Affirmative Action: Unlocking the Keys to Success

Speakers: Lori Stewart and Sally Makreff

Date: Thursday, October 10

Time: 2:30-3:45pm

Location: Portia and Wisteria

Track: Employment Law and Legislation

As organizations strive to comply with affirmative action regulations, understanding the duties and responsibilities that each person has in implementing the affirmative action program is crucial. Recruiters in particular play a vital role in the success of an organization's affirmative action program by ensuring that the recruitment process aligns with the organization's affirmative action goals. In this session we will provide strategies and techniques that participants can share with their recruiters and others in their organization that will enhance their affirmative action programs, drive meaningful change, and promote compliance. Join us for this comprehensive overview of affirmative action and learn best practices for successful implementation of an affirmative action program.

- Learning Objective 1: Learn what is included in a comprehensive affirmative action program and the role each person in an organization plays in the success of the AAPs.
- Learning Objective 2: Discuss common challenges that organizations encounter, especially recruiters, during the implementation process of the affirmative action program.
- Learning Objective 3: Offer practical solutions to overcome the obstacles faced by recruiters and others in your organization as it relates to compliance with the affirmative action regulations.

Sally Makreff, Manager and Senior Consultant at DCI Consulting Group, Inc., has over 20 years of experience in Affirmative Action and Equal Employment Opportunity (EEO). Skilled in government regulations and compliance, she is responsible for developing affirmative action plans for dozens of clients in a wide variety of industries as well as helping to educate and guide those practitioners using industry best practices. Sally is the chair of the Milwaukee, WI ILG.

Lori Stewart, HR Compliance Manager at Oshkosh Corporation, has over 15 years of experience in Affirmative Action and Equal Employment Opportunity (EEO). In her current role, she is responsible for in house affirmative action program management, vendor partnership on plan completion, and also owns the pre-employment background check and I-9 processes for the organization. Lori is co-chair of the Fox Valley ILG and participates in the Milwaukee ILG and Michigan ILG.





# Learning Session 4

## An Elephant Hunt: Is Your Team Thoughtfully Fit?

Speaker: Jim Mueller

Date: Thursday, October 10

Time: 4:00-5:15pm

Location: 1 and 2

Track: Personal and Leadership Development

Research shows that 90% of teams see themselves as underachieving, not exclusively because of external challenges, but because the team struggles with communication, conflict, and trust. Left unaddressed, these struggles can turn into elephants: issues that everyone avoids talking about that get in the way of your success. If you are part of the 90% of teams with these issues, it doesn't have to stay that way.

This dynamic session will explore the top practices of a Thoughtfully Fit Team and raise awareness of some of the “elephants” in the room with your team that are not being addressed. This powerful experience will help all team members get a better perspective of your team dynamics, understand the research on what creates high-performing teams, and leave with a tangible strategy you can apply immediately to notice and name the elephants in a positive way.

- Learning Objective 1: Recognize the impact you have on any interactions with peers, direct reports, and managers.
- Learning Objective 2: Gain awareness of what is needed to create a culture of trust and effective communication.
- Learning Objective 3: Explore how to name clear expectations (and hear them from the rest of the team).

JILL MUELLER is the VP for Training & Learning Experiences at Darcy Luoma Coaching & Consulting. After working in government and higher education, Jill earned her Master's in Human Resource & Workforce Development from UW-Milwaukee. Jill works with leaders and teams looking to achieve high performance and be Thoughtfully Fit.

## Managing Critical Conversations

Speaker: John Graci

Date: Thursday, October 10

Time: 4:00-5:15pm

Location: 3 and 4

Track: Personal and Leadership Development

HR professionals, do you find yourself taking on more conflict issues between leaders and co-workers? Leaders, are you delegating conflict resolution up to human resources? Leaders have an obligation to confront unwanted behavior that crushes productivity, destroys morale, and can push your best people out the door. Jammed with proven ideas, words and methods, this program delivers actionable tactics to reduce stress & conflict between leaders and team members. There is absolutely no theory!

Attendees will appreciate how John Graci makes the complex sound simple and compelling. John combines a “straightforward” and “tell-it-like-it-is” approach with real world solutions and wit, that come across as refreshing and riveting.

Below is a preview of some of the questions John will show attendees how to handle with tact and diplomacy. John welcomes the opportunity to tailor your specific questions into the presentation.

- Learning Objective 1: Approaches that minimize hostility and defensiveness!
- Learning Objective 2: Methods to repair damaged relationships - at work, at home, with any situation!
- Learning Objective 3: Coach the team member - so there's no chance of misunderstanding.

John Graci is a dynamic speaker, author, and trainer with more than 25 years of management experience helping leaders and team members “be nice” to one another. John is a member of the National Speakers Association and frequently delivers keynote presentations from coast to coast.

## The 5 Critical Elements to Creating a Firm Foundation for New Leaders

Speaker: Kelly Hirn

Date: Thursday, October 10

Time: 4:00-5:15pm

Location: 5 and 6

Track: Personal and Leadership Development

Leading Winning Cultures starts with the team leaders. I remember starting in my first formal corporate leadership role and there was a resounding feeling of loneliness to it. I loved that I got the opportunity, I loved that I'd have the ability to champion change and influence people on a larger scale, and I even loved that I'd have the chance to be coached by both my new team and by my peers. I knew I didn't know everything and I was so excited to learn all of the things I was doing wrong so I could improve them. In the beginning though, no one wanted anything to do with me. How would I impact the organization, my team, and the overall culture if I was the leper on the island?

My loneliness was 3 fold. I felt left out by my new peers. My team, those reporting to me, didn't trust that I knew what I was doing. Coming into a new role with new responsibilities, I didn't even trust that I knew what I was doing. It is that exact moment that our newest, greenest leaders need support. It's just at that moment where the trifecta of your peers, your reports, and yourself are all questioning your abilities that you need guidance, resources, objectives, unity, and time. Grout, like the mortar that holds all of those beautiful and strong tiles together. I had all the building blocks, that's why they hired me. All of those new leaders do. Sure some tiles may have a crack or two but for the most part, with the right grout, you're strong and capable of taking on whatever is thrown at you for years to come.

- Learning Objective 1: Develop Understanding and Empathy - Participants will empathize with the isolation and needs of new leaders, fostering a desire to address this gap within their organizations.
- Learning Objective 2: Framework Utilization - Participants will gain proficiency in applying the framework to tailor leadership transition strategies to meet specific organizational needs.
- Learning Objective 3: Encourage Actionable Next Steps - Participants will be able to assess their organization's current implementation of the framework and determine practical steps for improvement and advancement.

Kelly Hirn has been leading and developing leaders for more than 20 years. Her experience in leadership in industries from insurance, hospitality, education, construction, and more have led her to one conclusion. Leaders need more support to be effective and to be retained in the long term. Kelly's comical, real-world perspective on objective reflection and active development help her improve the leadership skills of the clients she works with.

## Navigating the Future of Work: Making Hybrid Work, Work!

Speakers: Kimberly Turnmire, Ashley Dahlen, Maggie Becker

Date: Thursday, October 10

Time: 4:00-5:15pm

Location: 7 and 8

Track: Business Acumen and HR Strategy

Together we will explore the intersection of hybrid work strategies and employee experience goals accomplished via flexibility, choice, communication, and leadership support. Attendees will gain insights into policy implementation, change management strategies, and fostering a culture conducive to successful hybrid work adoption. Attendees will walk away with tips, tricks and lessons learned in the process of implementing a successful Hybrid Work strategy at Organic Valley, an organization with a blend of desk and manufacturing workers.

- Learning Objective 1: Attendees will understand the framework of building a hybrid work strategy through collaboration of a cross-functional employee experience team.
- Learning Objective 2: Attendees will take away practical approaches for implementing a hybrid work strategy that fosters employee engagement, productivity, and well-being within diverse organizational contexts.
- Learning Objective 3: Attendees will learn how to effectively communicate, educate, and support employees at all levels in navigating the transition to a hybrid work model to ensure successful implementation with positive outcomes for the workforce and the organization.

Ashley Dahlen is an experienced HR leader, spending much of her career in talent acquisition and talent management. Currently a Director in Organic Valley's HR team, she provides strategic direction and practical advice to foster organizational success. She is a SHRM Certified Professional.

Kimberly Turnmire is the Vice President of Learning and Organizational Development at Organic Valley where she leads the talent development and OD strategies for Organic Valley's 900+ employees. Kimberly has spent her career focused on the learning, team effectiveness, organizational change, and leadership development needs of cooperatives. Kimberly holds a bachelor's in adult learning from the University of Wisconsin–Madison and MBA from Edgewood College.

Maggie Becker is a workplace management and sustainability expert, holding a master's degree in Sustainable Management from UW-Extension. She has spent her career bridging the gap between environmental responsibility and operational efficiency. Maggie has a passion for creating value through responsible business practices. She is adept at identifying opportunities to integrate sustainability into strategic planning and executing on initiatives that deliver tangible results.

## From Fatigue to Fatigues: How to Stay in the Diversity, Equity, Inclusion and Belonging Battle

Speaker: Kendra Q. Dodd

Date: Thursday, October 10

Time: 4:00-5:15pm

Location: A and B

Track: Inclusion and Belonging

These past years have been taxing on everyone, fatigue is growing with several aspects of the business and our employees' lives. Now more than ever, we need to exercise resilience when it comes to inclusion, diversity, equity, and belonging initiatives. Yet, how do we stay in "the good fight"? It may seem like the struggle to have adequate support and sponsorship, employee engagement, and having committed change agents is not worth sustaining or improving. This encouraging session will help you transition from being exhausted with the responsibility to lead and manage the DEIB platform to being geared with new strategies, tips, tools, and resources to help you combat the temptation to retreat.

- Learning Objective 1: Understand what diversity fatigue is and the common pitfalls that cause it.
- Learning Objective 2: Learn management tips and best practices to overcome diversity fatigue.
- Learning Objective 3: Learn assessment strategies to identify watchouts within your organization and how to implement a risk control plan.

Kendra is an author, a sought-after presenter, coach, and consultant with experience in process improvement, culture dynamics, & personal development. She has over 23 years of experience in organizational strategies, with expert knowledge in Human Resources, Diversity, Equity and Inclusion, Emotional Intelligence, Conflict Resolution, Change Management, and Organizational and Talent Development. Kendra has a master's degree in HR Development & certifications in HR, coaching & training.

## The Critical Role of Compensation in the Recruitment Process

Speaker: Matt Shefchik and Jenna Bidwell

Date: Thursday, October 10

Time: 4:00-5:15pm

Location: C and D

Track: Total Rewards

In the dynamic landscape of talent acquisition, organizations are continually seeking the most effective strategies to attract and retain top-tier talent. While numerous factors influence a candidate's decision to join a company, one aspect consistently stands out as a pivotal determinant: compensation.

This session delves into the intricacies of designing, communicating, and implementing compensation strategies that not only meet the expectations of prospective employees but also align with the broader organizational goals. By scrutinizing market challenges, legal considerations, and systemic factors contributing to pay disparities, businesses can cultivate a culture of transparency and equity, ultimately becoming employers of choice and ensuring they secure the services of the most skilled and motivated professionals.

- Learning Objective 1: Learn how to effectively position your compensation packages to stand out in the eyes of top talent. This includes exploring insights into tailoring benefits and perks that resonate with candidates, creating a compelling narrative that goes beyond monetary value.
- Learning Objective 2: Discover the significance of openness in communicating compensation structures and how it can positively impact your employer brand. Uncover the tools and techniques to foster transparency, creating a culture of trust and fairness.
- Learning Objective 3: Explore the profound impact of pay equity on employee morale, engagement, and overall organizational success. Gain insights into crafting compensation structures that foster inclusivity and diversity.

Jenna Bidwell has over 15 years of human resources experience with nearly 10 years consulting with clients in the areas of compensation and the employee experience. Jenna leads the Carlson Dettmann Consulting education sector team primarily supporting educational institutions in the upper Midwest. She received a bachelor's degree from the Wisconsin School of Business with an emphasis in management and human resources. Jenna is a certified strength's coach through Gallup.

Matt Shefchik has over 20 years in the field of compensation. Consulting with clients on compensation and HR management projects since 2002, his areas of concentration are employee and executive compensation, sales and incentive compensation, job evaluation, and employee engagement. He is an expert witness on compensation matters. He holds a bachelor's degree from University of Wisconsin-Madison double majoring in management & HR, and marketing. He has the SHRM-SCP certification.



## Avoiding FMLA Retaliation Claims: Case Studies for Employers

Speaker: Erica Storm

Date: Thursday, October 10

Time: 4:00-5:15pm

Location: E and F

Track: Employment Law and Legislation

Employees who have their FMLA claims denied often think their employers have illegally retaliated against them. Fortunately, there are many strategies employers can use to safeguard against these claims. In this session, we will look at recent real-life examples of how employers have handled these claims.

- Learning Objective 1: Know what an employee has to prove to succeed on an FMLA retaliation claim.
- Learning Objective 2: Learn about recent FMLA litigation and how it affects Wisconsin employers.
- Learning Objective 3: Review best practices for FMLA compliance and risk management related to claims.

Erica Storm is a Shareholder focusing on employment law and employee benefits law and compliance. Previously, Erica was a Senior Director at Zywave, Inc. where she focused on the integration of HR and compliance products, implemented new technology solutions, and oversaw legal content surrounding employment and employee benefits law.



## Not your Parents 401(k) – The Art of “Hyper-Personalization”

Speaker: Greg Gavran and Colin Hendricks

Date: Thursday, October 10

Time: 4:00-5:15pm

Location: G and H

Track: Total Rewards

Retirement plans today are more than just a place to save money for the future, for both you, the HR Professional and your employees. Today’s workers are searching for holistic solutions to life’s problems from you, their employer, and you are being asked to provide benefits that a decade ago, were not even contemplated. Issues related to healthcare, education, retention, attraction and incentivization can all be addressed via a well designed and implemented retirement plan. “Hyper-personalization” is the term used to describe the design of a plan that can solve the needs of multiple employee groups at one time, allowing you the ability to offer solutions and options that at one time, were also not contemplated via your company retirement plan.

- Learning Objective 1: Attendees will learn concepts that they can implement immediately into their retirement plan and begin to customize their plan offering.
- Learning Objective 2: Attendees will understand where ideas in plan design are headed, and how those ideas will result in “hyper-personalization” of their “benefit stack”, providing them with more tools to attract, retain and incentivize their employees.
- Learning Objective 3: Regulations are an ever moving targets, attendees will learn what is law, what is proposed and how those new regs may benefit them and their employees in the future.

Greg is a founder and Partner of Strategic Retirement Partners. Their mission is to help move people from work to retirement in a dignified manner, while, at the same time, helping employers attract and retain their talent by customizing their benefit to fit the needs of their workforce.

Jeff Cullen is a founder and CEO of Strategic Retirement Partners. He is passionate about helping corporations and non-profits attract, retain, and reward their most prized asset, their people. By sharing the vision of “Hyper-Personalization”, he hopes to change how financial benefits are delivered and perceived.

## Unlocking Potential: The Strategic Advantage of Intrapreneurship

Speaker: Emily Smit

Date: Thursday, October 10

Time: 4:00-5:15pm

Location: Guava and Tamarind

Track: Personal and Leadership Development

Join us for an enlightening session on building and fostering a dynamic learning culture within your organization. Discover strategies and best practices to cultivate an environment where continuous learning is embraced at every level. From entry level roles to executives, including shiftwork, remote employees, and field-based staff, attendees will gain valuable insights into the benefits of nurturing a learning culture, including increased employee engagement, improved performance, and enhanced organizational agility. Through engaging discussions and practical examples, participants will leave equipped with actionable techniques to implement within their own teams, driving innovation and success.

- Learning Objective 1: Understand the key components of building a learning culture and its impact on organizational performance.
- Learning Objective 2: Learn practical strategies for promoting continuous learning and knowledge sharing among employees.
- Learning Objective 3: Explore methods for overcoming common challenges, removing barriers, and fostering a culture of curiosity and growth mindset within the workplace.

Learning and Development professional with more than 15 years in the talent development space and a leader driving workforce advancement and professional development skills within the alcohol beverage sector. Seasoned in cultivating talent across the entire organization from entry level to executive leadership.

## Job Ad Writing Workshop—Using SEO, Algorithms, and AI

Speaker: Steven Smith

Date: Thursday, October 10

Time: 4:00-5:15pm

Location: Portia and Wisteria

Track: Talent Acquisition and Retention

Did you know for every 1 applicant you see in your inbox, there are 100+ potentially interested and qualified candidates who didn't make it through the application process?

The challenge is that over 80% of companies admit to using a job description as their job ad, which limits their online visibility and searchability. In some cases, descriptions are also scaring applicants away. It is true that job descriptions can help identify particular skills or abilities that are necessary for a position or describe the environmental pressures that apply to the position. The job description can also help an organization stay compliant based on certain legal standards.

However, a job description was never meant to be an actual job ad. The primary goal of your job ad is to create a consistent flow of applicants. It should be written as a means to better explain why a job seeker should want to apply to your job versus what they are doing currently.

In a hyper-competitive talent market, you want to stand out from the crowd rather than blend in. This workshop is designed to educate attendees on the history of recruitment marketing from the newspaper days to the evolution of smart technology, which was designed to simplify the hiring process. Understanding this technology and the role everyone in the organization plays in this process is crucial to success.

- Learning Objective 1: Gain a sound understanding of the role of Search Engine Optimization, Artificial Intelligence, and other marketing principles in the hiring process
- Learning Objective 2: Learn the 6 fundamental steps to a job ad and how the order of your ad can produce 30-300% more applicants
- Learning Objective 3: Understand the basic concept of generative AI, which is only one of 6 AI concepts, and use ChatGPT to facilitate what is learned in this session, avoid the legal implications and focus on what can be done in an ethical way.

Steve will tell you recruiting is marketing. He earned his Bachelor of Science in Finance at BYU and started recruiting in Feb 2005. In 2008, he helped start a company with Ryan Kohler, called ApplicantPro, a full suite HR platform with 11,000+ clients. Close to 300 employees, ApplicantPro has made the Inc 5000 list 11 years in a row. Steve currently volunteers on the Utah SHRM State Council as the past State Executive Director. His book, *The Hiring Tree*, released in 2023, has helped 1000s of organizations understand the principles of SEO, AI & marketing, to develop a solid hiring framework.

# Early Bird 2

## Leadership De-Railers

Speaker(s): Susan Thompson

Date: Friday, October 11

Time: 6:15-7:15am

Location: E and F

Track: Personal and Leadership Development

Leadership De-Railers are just that - habits and behaviors that can stall or sabotage your promising career. They are most often related to issues around self-awareness and self-management, and can keep you - the leader or up-and-coming leader - from leveraging your gifts and strengths. The first part of transformation is awareness, so in this high-energy, fast-paced session, you'll learn about the 8 top de-railers - and what to do about them! This is a great session for anyone who wants to improve their leadership skills, irrespective of your role.

- Learning Objective 1: Learn about common de-railers and be able to spot them in yourself as well as people you are mentoring or supervising.
- Learning Objective 2: Gain awareness so that you know what to work on, and what your triggers are.
- Learning Objective 3: Learn common listening traps that fuel many self-sabotaging behaviors.

A former division president, and globally award winning business coach, Susan candidly shares both the good and the tough stuff of running a company with business leaders, so they can become better, more confident leaders and simplify their day-to-day. She's spoken to thousands of business leaders over the last 16 years about how to lead, simplify, scale, and transition.

## Master Your Mindset: Harnessing the Power of Your Brain to Raise Resilience and Get Results

Speaker(s): Becky Tuma

Date: Friday, October 11

Time: 6:15-7:15am

Location: G and H

Track: Personal and Leadership Development

Have you ever found yourself stuck in the loop of professional "survival mode?"

Have you tried to figure out how to break free from the same old mental patterns but struggled to efficiently do so?

Are you challenged to effectively lead and support teammates, direct reports (and yourself) due to negative mindset and mental performance blocks?

In "Master Your Mindset" we will begin by diving into understanding the workings of our brain and why fostering and maintaining a healthy mind is imperative to becoming a resilient self-leader and leader of others. Through interaction, we will learn of the 6 facets of neuroplasticity and develop a plan to nurture these facets both in ourselves and in those we support. Then we will learn the basics of mental performance training - similar to the routines utilized by the most successful athletes in the world - and how we, as professionals, can engage in similar routines to combat stressful situations and remain resilient and steadfast when the pressure is on!

- Learning Objective 1: "Until you make the unconscious conscious, it will direct your life and you will call it fate." (Carl Jung) Participants will learn the basics of brain behavior and how our conscious and nonconscious drivers are often at odds. Participants will learn basic steps to override those nonconscious drivers and deliberate, intentional steps to take to nurture and engage our logical, rational brain mode to yield higher mental performance.
- Learning Objective 2: Participants will learn what it takes to develop an "elite" mindset, dispel myths about what it takes to develop an elite mindset, and learn how an elite mindset helps us perform better at work and show up as our best selves for our teammates/colleagues/those we support.
- Learning Objective 3: Participants will learn how to implement routines (recognize-release-refocus) and habits similar to world-class athletes to overcome adversity. Through discussion of tools available such as mental imagery, visualization, the ABCs of focus, telescope vs. microscope goals, BFS (body language, focus, self-talk), participants will formulate an individual game-plan to put into practice immediately.

With 2 decades of experience in the fields of HR, training & development, Becky Tuma found a niche in employee & leadership coaching. Upon the sudden loss of her daughter in 2010, Becky began to embark on a journey of understanding mindset, resiliency and mental performance, obtaining her MS in Leadership & certifications as a Brain Coach, Mental Performance Mastery

and Health & Wellness. Becky combines her education and experience to coach leaders & employees on developing a healthy mindset.

## How the PWFA, ADA, and FMLA Interact

Speaker(s): Darlene Clabault

Date: Friday, October 11

Time: 6:15-7:15am

Location: Guava and Tamarind

Track: Employment Law & Legislation

An employee requests time off for in-vitro fertilization. How do you respond? What if employee requests time off for gestational diabetes? Employees could have rights and protections under the Pregnant Workers Fairness Act (PWFA), the Americans with Disabilities Act (ADA), and/or the Family and Medical Leave Act (FMLA). Employers need to know how to handle such requests, and how protections under the three laws interact.

- Learning Objective 1: Attendees will learn how to identify employee requests under the laws, which would trigger employer obligations. [training]
- Learning Objective 2: Attendees will learn the protections and benefits of each law; how they interact and don't; the gaps that are filled in.
- Learning Objective 3: Attendees will learn how to handle requests related to the laws, including communicating, seeing the big picture, responding, accommodations (including leave).

Darlene (Dolly) Clabault, a seasoned Editor since 1996, specializes in some of the most complex employment laws. She is a passionate expert on the Family Medical Leave Act (FMLA), Americans with Disabilities Act (ADA), state leave provisions, and the Fair Labor Standards Act (FLSA).

# Learning Session 5

## What if... There IS an "I" in Team

Speaker(s): Nancy Kalsow

Date: Friday, October 11

Time: 10-11:15am

Location: 1 and 2

Track: Personal and Leadership Development

There might not be an I in Team but there is a ME! This is a simple, yet fun twist to the common cliché that there is no I in team. Nancy will remove the egotistical I's and encourage the creativity of ME's to unite a team to a WE status. Nancy shares the importance of uniting and aligning a team by accepting and honoring the individual talents of each team member. Following the acronym of R.E.A.L. (Reflect. Engage. Align. Lead), Nancy creates a winning strategy for all team members to feel heard, understood, appreciated, valued, and respected.

- Learning Objective 1: Honor and celebrate uniqueness of each 'me' on your team to create real teamwork.
- Learning Objective 2: Learn how to Reflect as a team, Engage collaboratively, Align talents to outcomes and Lead with integrity.
- Learning Objective 3: Gain understanding of what an aligned team is and isn't.

Nancy Kalsow is a spirited leader who believes everyone deserves someone in their corner. She ignites confidence and courage in teams by honoring individual uniqueness and nurturing team greatness. Nancy brings fresh perspective to an old cliché through her reflection of 35+ years in leadership. She utilizes her Professional Certified Coach and SHRM-SCP credentials to guide teams in unleashing their inner leader. Get ready to Be R.E.A.L. with Coach K!



## Courageous Culture: Empowering Open Dialogue in the Face of Risk

Speaker(s): Ivna Curi

Date: Friday, October 11

Time: 10-11:15am

Location: 5 and 6

Track: Personal and Leadership Development

Two-thirds of employees often remain silent due to fear of backlash or inaction. This session aims at creating a 'Courageous Culture' to empower individuals to confidently voice their opinions, even in situations lacking psychological safety. Attendees will learn strategies to promote open communication, enhance speaking up rewards, and reduce communication risks. Through self-advocacy, leadership, and ownership voices, the goal is to build a resilient organizational culture where speaking up is encouraged and supported. Practical tools and real-world examples will be provided to help implement these strategies effectively in any organization.

- Learning Objective 1: Identify common communication barriers.
- Learning Objective 2: Develop leadership strategies for empowering courageous conversations.
- Learning Objective 3: Cultivate a courageous speaking up culture.

Ivna Curi fosters open communication within organizations to boost productivity, engagement, and innovation. As a Forbes contributor, INSEAD MBA, TEDx speaker, host of the 300+ episode podcast "Speak Your Mind Unapologetically" and author of "Unapologetic Voice," empowers professionals to advocate for themselves, for their teams, and for their organization.

## Strategic Insights: Understanding the Importance of HR Audits

Speaker(s): Sheri Bender

Date: Friday, October 11

Time: 10-11:15am

Location: 7 and 8

Track: Business Acumen and HR Strategy

Participants will leave this session equipped with practical skills and actionable insights to make a tangible impact within their organizations. Tailored for HR professionals across organizations of all sizes, this session is designed to empower you to navigate the complexities of HR compliance and practices and to the creation of a thriving workplace culture.

Seize this opportunity to elevate your understanding of HR audits and leverage their strategic advantages for organizational excellence. Join us in shaping a positive future for your workplace!

- Learning Objective 1: Gain a comprehensive overview of HR audits and their pivotal role in fostering organizational excellence.
- Learning Objective 2: Explore how proactive compliance audits contribute to risk mitigation, legal adherence, and enhanced operational efficiency.
- Learning Objective 3: Learn practical strategies to translate audit insights into actionable steps.

Sheri Bender is a HR consultant, seasoned Leadership Trainer, Certified Diversity Executive (CDE)<sup>®</sup>, and Associate Certified Coach (ACC) with a down-to-Earth approach. She holds a Master's degree in Human Resource Development from James Madison University and has amassed a wealth of experience over her 25-year career in various HR-related positions. Sheri has multiple certifications in HR and is also a Certified Health Coach. She believes everyone deserves to work where they find joy.

## DEI in Flux: Strategies for Achieving Meaningful Outcomes in Uncertain Times

Speaker(s): Nicole Armstrong

Date: Friday, October 11

Time: 10-11:15am

Location: A and B

Track: Inclusion and Belonging

In the wake of recent events and amidst growing scrutiny over past failures of Diversity, Equity, and Inclusion (DEI) initiatives, our session takes on a renewed urgency. Join us as we explore how a data-driven approach can not only ensure compliance but also drive measurable outcomes, reshaping the trajectory of DEI efforts.

The current debate around the future of DEI serves as a valuable lesson in the importance of deliberate action and systemic change. By focusing on creating fair workplaces for all and implementing systemic approaches that improve the experiences of every employee, we can ensure that our outcomes align with our intentions.

Against this backdrop, we'll explore transformative data-driven strategies that can be used when navigating the complexities of DEI. By leveraging data to inform decision-making, organizations can ensure compliance with evolving legal standards while also uncovering actionable insights that lead to measurable progress.

Through insightful case studies and real-world examples, we'll demonstrate how taking a data-driven approach can transcend the limitations of traditional DEI efforts, yielding tangible improvements in employee engagement, organizational performance, and beyond.

Join us as we embark on a journey to reimagine DEI. Together, we'll chart a course towards a future where data-driven initiatives centered on people set the stage for resilient, inclusive, and thriving workplaces.

- Learning Objective 1: Explore the dynamic shifts in DEI strategies amidst uncertain socio-political climates, empowering attendees to navigate and adapt to these changes effectively.
- Learning Objective 2: Equip participants with the skills to proficiently analyze employee data, enabling the prioritization and execution of impactful DEI initiatives, even within resource-constrained environments.
- Learning Objective 3: Uncover how leading organizations seamlessly integrate DEI principles into their operational frameworks, fostering tangible enhancements in employee well-being and organizational resilience, serving as guiding templates for implementation.

Nicole, an award-winning social entrepreneur, leverages 15+ years in design thinking and social innovation to pioneer the nation's first certification and advanced analytics platform for

workplace equity. A People's Liberty Haile Fellow, Cincinnati Business Courier Forty Under 40 honoree, and Goldman Sachs 10,000 Small Businesses graduate, she holds degrees from the University of Cincinnati and Suffolk University.

## Bridging Talent Gaps: A Roadmap for Seamless Connections with Local High Schools and Young Talent

Speaker(s): Leah Bruess, Cyndi Pavelka, Rebecca Droessler, Tania Kilpatrick

Date: Friday, October 11

Time: 10-11:15am

Location: C and D

Track: Talent Acquisition and Retention

Gain insights into local and statewide collaborative initiatives that seamlessly connect business with educational institutions. These initiatives serve as catalysts, fostering a robust pipeline of skilled and motivated talent. Gain valuable insights from seasoned HR staff who have navigated the complexities of engaging with local K-12 schools and have secured a pipeline of skilled and motivated talent in WI. Uncover actionable ways to directly link your organization to the academic and career planning process within local schools and uncover valuable benchmarking opportunities to refine and elevate your talent acquisition strategy.

- Learning Objective 1: Attendees will learn how to seamlessly connect with local high schools to foster talent acquisition through work-based learning and career experiences.
- Learning Objective 2: Obtain resources and toolkit to support your organization with attracting, onboarding and mentoring young and future talent.
- Learning Objective 3: Hear from organizations that have been successful with program integrations to solve similar talent acquisition challenges including the navigation of minor labor laws and retention of young talent.

As a certified School Counselor, Career & Technical Education Coordinator, Global Career Development Facilitator (GCDF) and Certified Career Services Provider (CCSP), Rebecca Droessler understands the complexities of career services for students and is committed to fostering students' career readiness within the school and the broader community. With a passion for guiding students toward successful futures, Rebecca brings a wealth of experience and expertise to the realm of academic and career counseling.

As a champion of career development, Rebecca is known for creating innovative programs that empower students to explore and pursue their professional interests. With a keen understanding of the ever-evolving job market and student career development strategies, Rebecca ensures that students are equipped with the necessary skills and knowledge to navigate the complexities of their chosen career paths.

## Unlocking Tomorrow's HR: Navigating the Tech Terrain of Software Solutions and Policies

Speaker(s): Tricia Shields and Chris Krause

Date: Friday, October 11

Time: 10-11:15am

Location: E and F

Track: HR Technology

Let's take a journey into the dynamic world of HR technology. From cutting-edge software solutions to evolving policies, we'll explore how technology is reshaping the landscape of Human Resources. Join us as we navigate the intricate terrain of tech innovation, uncovering strategies to leverage these advancements for enhanced performance and organizational success. Going beyond simple secure electronic storage of your vital HR records, we will share how organizations like yours can leverage technology and intelligent automation to remain compliant with your HR records, improve employee performance review processes, On-Boarding and Off-Boarding processes to save you time for building stronger influential relationships with your organization. How are your HR initiatives impacted by the evolution of technology and does your vision include the adoption of the latest technologies like artificial intelligence?

This session promises valuable insights and practical guidance with firsthand experiences for unlocking tomorrow's HR potential.

- Learning Objective 1: To understand how HR and the employee experience can benefit from strategic planning before seeking a technology solution.
- Learning Objective 2: To learn about opportunities to improve the corporate experience with HR leveraging technology.
- Learning Objective 3: Learn how technology and an analytical aptitude will yield insightful outcomes for you, your leaders and the entire organization.

Chris Krause is a seasoned professional renowned for his strategic prowess and innovative leadership. With an illustrious career spanning three decades, he consistently spearheads transformative initiatives, across a variety of industries. His dedication to excellence and visionary approach to solutions continue to improve the HR experience for Naviant's clients.

Tricia Shields, Chief Human Resources Officer at Naviant, brings 20+ years of human resources expertise. Throughout her career, she has witnessed HR professionals across industries confront similar challenges: endless needs and a shortage of time, all while their roles continue to evolve rapidly. The answer: Adaptability and an innovative embrace of technology. Since leading her own HR department's digital transformation, Tricia has been on a mission to inspire other HR professionals to embrace technology.



## Trust Edge 2.0

Speaker(s): David Horsager

Date: Friday, October 11

Time: 10-11:15am

Location: G and H

Track: Personal and Leadership Development

Take trust to the next level by diving deeper into four more pillars in the framework and gain the strategic advantage of being a trusted leader. During this interactive session, David will share the process for leaders to increase engagement and earn the trust of those they lead.

- Learning Objective 1: Deepen your understanding of trust with an exploration of additional pillars within the framework.
- Learning Objective 2: Strengthen your leadership toolkit with actionable Trust Edge techniques.
- Learning Objective 3: Gain insights into increasing engagement and fostering trust among team members.

David Horsager, MA, CSP, CPAE is the CEO of Trust Edge Leadership Institute, Global Trust Expert, Trust Expert in Residence at High Point University, Board member and Wall Street Journal bestselling author. David has advised leaders on six continents, from FedEx, Toyota, MIT, and global governments to the New York Yankees and the Department of Homeland Security.



## Mind Over Meetings

Speaker(s): Kody Green

Date: Friday, October 11

Time: 10-11:15am

Location: Guava and Tamarind

Track: Inclusion and Belonging

Kody Green shares his lived experiences as a person living with schizophrenia, and discusses the importance of understanding mental health and mental illness in the workplace.

Kody uses a combination of his personal experience and workplace statistics to show how Human Resource Professionals can create a more inclusive environment using mental health awareness. By providing simple resources and understanding employees needs and accommodations, employers can ensure not to lose great employees who may be struggling.

Join us for a better understanding of mental illness, employee wellbeing, and the benefits of retention. It's time to start putting Minds Before Meetings.

- Learning Objective 1: Understand the lived experience of an individual that lives with a severe mental illness and how HR helped this person maintain employment and reduce turnover.
- Learning Objective 2: Understanding the statistics behind mental health issues and diagnoses.
- Learning Objective 3: Combining the mental health statistics with lived experience, to create a more sustainable work environment for your employees.

Kody Green (He/Him) is a 28 year old with a diagnosis of Undifferentiated Schizophrenia. Kody is a motivational speaker and content creator with over 1 million followers on TikTok. He has struggled in the past with drug addiction, incarceration, and serious mental health issues.

Kody uses a combination of lived experiences and SHRM research to show the importance of focusing on mental health in the workplace.

## Accountability: Everyone says their company lacks it, but no one really knows how to improve it

Speaker(s): Kelly Renz

Date: Friday, October 11

Time: 10-11:15am

Location: Portia and Wisteria

Track: Business Acumen and HR Strategy

Accountability is considered an elusive but necessary competency of an organization. Why is it elusive? Because enforcing accountability gets an unfair bad rap. Many people consider it a people issue, but really lack of accountability is a business operating system issue. Leaders struggle to create accountable teams because they don't know the few but mighty tools available to them to foster the right environment to promote it. It starts with understanding that a culture of accountability is not unkind, but instead it paves the way to high performance. From there, the benefits are exponential.

- Learning Objective 1: Create a common definition and understanding of what accountable cultures do differently to perform better.
- Learning Objective 2: Learn the key components of creating an accountable culture.
- Learning Objective 3: Equip HR professionals with how they can have a direct and immediate impact on their organization's accountability.

After nearly 25 years as a HR and business executive, Kelly became an entrepreneurial CEO. She is one of 100 Pinnacle Business Guides in the world because she enjoys coaching leadership teams to get more of what they want from their businesses. Kelly is President Elect of the Metro Milwaukee SHRM chapter.