IOWA BANKERS ASSOCIATION

2025 IBA Succession Planning Online Workshop Series

Presented by: Marci Malzahn

Nov. 3 • 10 am - Noon CT

Nov. 17 • 10 am - Noon CT

This two-part online workshop series is designed to help community banks establish a robust succession planning process. Participants will learn how to create a comprehensive succession plan, conduct talent assessments to identify skills gaps, and develop personalized development plans for their successors, focusing on leadership, management, and technical skills.

Workshop Topics

Part 1: Laying the Foundation: November 3 • 10 am - Noon

1. Building a Strong Future: Establish your Succession Planning Process – from how you identify employees retiring and potential successors to how you train and develop your successors including the timeline.
2. The Blueprint for Success: Developing your Succession Plan for the CEO, Senior Leadership Team, next level managers, and key positions in the bank. Leverage AI to help you find the right successors based on their personality, skills, and experience and match them to the types of jobs needing to be filled.
3. Future-Proofing Your Bank: Conducting a Talent Assessment to identify the talent you currently have in the bank, and potential skills gaps your organization may need for future growth, including new positions.

Part 2: Developing Your Successors : November 17 • 10 am - Noon

1. Nurturing Tomorrow's Leaders: Creating Personal Development Plans for your identified successors in the various areas. Leverage AI to help you create individual plans.
2. From Potential to Performance: Developing a Leadership Talent Development Program and Management Skills Training Program for the successors based on their personal needs.
3. Empowering Successors: Establishing a Technical and Job Skills Enhancement Program to prepare your successors to take on their new jobs at the right time and to retain your top talent.

Who Should Attend?

Senior Executives and Board Members, Human Resources Managers, Department Heads and Managers, and potential successors (individuals being groomed for leadership positions should understand the succession planning process and their role in it).

REGISTRATION

Registration Fee:

$600 *(per organization)*

Registration Includes:

Webinar series is $600/organization and includes both sessions, workshop materials, planning resources, and a 20-minute consultation with Mahlzahn Strategic. A recording will be available to all registrants following the event.

Register online:

www.iowabankers.com
(Events tab – scroll to date)

Or mail registration form with payment to:

Iowa Bankers Association,
Attn: Registrar, PO Box 6200
Johnston, IA 50131

For online registration and information about additional IBA training and development see www.iowabankers.com

2025 IBA Succession Planning Online Workshop Series

Bank ______________________________

Address ______________________________

City ________________ State ________ ZIP ____________

Phone ______________________________

1. Name ______________________________

Email ______________________________

This is the main contact for the webinar. Links can then be shared with additional participants from your organization.

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About the Speaker

Marci Malzahn

Marci Malzahn is the president and founder of Malzahn Strategic, a financial institution consultancy focused on strategic planning, enterprise risk management, treasury management, and talent management. Marci has 23 years of banking experience, the last ten as the EVP/CFO/COO of a community bank she co-founded where she oversaw all the bank operations areas. In her last year as EVP/COO/CRO, Marci created and focused on the bank's risk management program. She was also the corporate secretary of both the holding company and the bank. Before starting the bank in 2005, Marci took a detour from banking for five years and worked for a $34 million revenue non-profit organization where she led IT, HR and Finance. Marci is the recipient of a number of professional awards, is a published author of three books, and an international bilingual professional speaker, speaking frequently at banking conferences and associations as well as webinars. Marci holds a B.A. in business management from Bethel University, is a certified life coach, and is a graduate of the Graduate School of Banking in Madison, Wisconsin.

Key Takeaways

- You will gain a comprehensive understanding of how to establish a well-structured succession plan tailored for your community bank.
- You will have the opportunity to develop a detailed succession plan for both current leadership and their potential successors.
- You will receive practical tools and guidance to create personalized development plans for identified successors, focusing on leadership, management, and technical skills.

Online Meeting Dates

Nov. 3 • 10 am - Noon CT

Nov. 17 • 10 am - Noon CT

Details

Webinars will be presented via Zoom. Links will be sent prior to event to main contact. This link can be shared with additional partipants from your bank.

A recording will be available to all registrants following the event.

Questions

Contact Darcy Burnett at:

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515-286-4352

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