



# **2017 AFSA LEADERSHIP DEVELOPMENT PROGRAM**

*Invest in the development of  
your organization's future leaders*

**University of North Carolina  
Chapel Hill, North Carolina  
July 15-22, 2017**

# **BEN ROSEN, Ph.D.**

## **Faculty Director, AFSA Leadership Development Program**



***The new, fast-paced format allows participants to immerse themselves in cutting edge principles of management and leadership.***

It is often said that great leaders read the handwriting on the wall before their competitors even see the wall. Leaders share their visions, build strong coalitions and position their organizations for sustainable success. Accordingly, there can be no greater business investment than the development of future leaders.

The AFSA Education Foundation in partnership with the University of North Carolina's Kenan-Flagler Business School offers an outstanding leadership development opportunity. We are pleased to announce that the AFSA Leadership Development Program will be offered on July 15-22, 2017.

In recent years, we have completely redesigned the management development experience. To accommodate the busy schedules of today's up and coming leaders, the program has been condensed from two weeks to six intensive days. The new, fast-paced format allows participants to immerse themselves in cutting edge principles of management and leadership through class discussions, case analyses and computer simulations. Here are some of the highlights of the 2016 Program:

- Learning the responsibilities of leadership, including articulating a vision and communicating the vision with passion and urgency.
- Creating a plan for strategic change and receiving immediate feedback on employee buy-in in the context of a challenging computer simulation.
- Developing an ethical "rule of thumb" for making business decisions quickly and effectively.
- Mastering critical negotiation skills including "principled negotiation", "interest based negotiation" and "win-win" negotiation.
- Building confidence in the ability to make dynamic and persuasive presentations.
- Analyzing strategic decision-making in the context of cases in the financial service industry.
- Experiencing first-hand the dynamics of building trust, collaborating and creating an effective team.
- Receiving an update on 2017 critical regulatory issues from industry experts.

Beyond the class room, participants have ample opportunity to expand their professional networks, benchmark best practices across the industry and build lasting personal friendships.

The program takes place at the Paul J. Rizzo Conference Center in Chapel Hill, an unparalleled facility for world class executive development. Set in a 28-acre wooded environment near the University of North Carolina campus, the state of the art complex is a self-contained learning community. Leading edge instructional technology and expert technical support, and a relaxed retreat setting provide an ideal learning environment for executives. The facility includes a modern residential complex complete with swimming pool, health club and an elegant dining and social center.

We encourage you to invest in the future leadership of your organization and sponsor your "best and brightest" managers.

Sincerely,

A handwritten signature in black ink that reads "Ben Rosen". The signature is fluid and cursive, written in a professional style.

Ben Rosen, Ph.D.  
Faculty Director, AFSA Leadership Development Program



# AFSA PROFESSIONAL DEVELOPMENT COMMITTEE

## **JEFFREY CASEY**

Chair, Professional Development Committee  
Senior Vice President, Mariner Finance, LLC

## **RHONDA ASHBURN**

Executive Director  
AFSA Education Foundation

## **SUSAN BLUMENSTOCK**

Vice President & COO  
Personal Finance Company, LLC

## **DENNIS CONTIC, JR**

Chief Administrative Officer  
Lendmark Financial Services, LLC

## **HUGH DOHERTY**

Vice President/Director of Operations  
Brundage Management/Sun Loan Company

## **BILLY FULLER**

Chief Operating Officer  
Tidewater Finance Company

## **NICOLE MASON**

Program Manager, Executive Development  
UNC Kenan-Flagler Business School

## **JANET MATRICCIANI**

Chief Executive Officer  
World Acceptance Corporation

## **SHARON MOORE**

President  
Career Success

## **JOAN K. REBOIJ**

VP-Managing Director, Learning  
OneMain Financial Services

## **BEN ROSEN, Ph.D.**

Hanes Professor  
Kenan-Flagler Business School  
University of North Carolina

## **CHRIS STINEBERT**

President & CEO  
American Financial Services Association

## **BILL STUBBS**

Vice President &  
Chief Human Resources Officer  
Regional Management Corp.

# MESSAGE FROM THE PROFESSIONAL DEVELOPMENT COMMITTEE

*“Financial services is, at its core, a business by and for people, which values effective leadership above all. Our industry needs leaders who are strategic, ethical and understand that it is those they lead who create the most value for our business and customers. Supported by these leadership pillars, the AFSA Leadership Development Program (LDP) challenges attendees with a curriculum which enhances current leadership skills, driving personal and professional growth through participation in interactive, thought provoking sessions. We believe in results and that is what AFSA LDP is all about! If you are looking to take the next step in your career or develop the skills of your leaders, AFSA LDP is where you need to be.”*

## CLASS PRESIDENT’S TESTIMONIAL



*“What I learned from the AFSA Leadership Development Program is difficult to put into words. I have been privileged to attend conferences and developmental programs throughout my career and none have come close to the program at Chapel Hill, N.C.! I found out that I not only have a type A personality but an extreme type A personality and that I needed to define urgent items for the day from my non-urgent items for the day. Leaders are like conductors, we all have talents, and I need to work with each of my team members to get the most out of their talents to be effective for the group as a whole. As our consumer finance industry changes we have to be able to change with it or we will be left behind as our competitors will pass us by. We had an amazing Program Manager that made sure that all of our needs and our concerns were met and addressed. The Professors were very knowledgeable and understood our industry very well. I learned that we must make strong ethical choices that will benefit each of our companies but our industry as well. If we are not moving, we are falling behind. We cannot be a SALY type leader (Same as Last Year), we must educate and inspire our team members and there is no better place to learn this than at the AFSA Leadership Development Program. In conclusion, I was able to network and build relationships that will last a lifetime. It completely changed my life and discussing this with my class I found that they all feel the same. If you want to become a better leader you will add this program to your list because it will become the highlight of your career. If you are an organization that wants to get the most out of your team members, you will find that all of your needs can be met at the AFSA Leadership Development Program at Chapel Hill!”*

## **JIMMY R. FAIRBANKS, JR.**

2016 Class President  
Regional Operations Director  
1<sup>st</sup> Franklin Financial Corporation

# AFSA LEADERSHIP DEVELOPMENT PROGRAM

## BEN ROSEN

Hanes Professor of Management, Ph.D., University of North Carolina, Kenan-Flagler Business School

### MANAGING AND LEADING

Great managers begin by learning to manage themselves effectively. Self-management requires a clear sense of priorities and the discipline to stay focused on those activities that add value to the organization. Beyond self-management, successful managers quickly learn that they cannot do everything themselves. Rather, they must learn to delegate, empower and build high-performance teams.

While managers are responsible for meeting short-term goals, leaders are expected to be visionaries who see the handwriting on the wall before their competitors even see the wall. Leaders focus on the future, communicate goals with a sense of urgency, shape the culture and push for change. It is the leader's responsibility to position the organization for long-term success.

Participants will learn to:

- Set priorities and manage time effectively
- Delegate and empower their direct reports
- Build high-performance teams
- Develop and communicate a vision statement
- Help shape a corporate culture
- Position their organizations to gain a competitive advantage

## PAUL FRIGA

Professor of Organizational Behavior, Ph.D., University of North Carolina, Kenan-Flagler Business School

### STRATEGY ISSUES CASE STUDIES

Strategy demands vigilance, an understanding of the environment and a view to the future. To manage strategy, think about CLASS – Culture, Leadership, Alignment, Structure and Systems.

Participants will examine two case studies of firms in the financial services industry and consider the strategic decisions made by top executives and the consequences of these decisions for various stakeholders, including customers, stockholders, employees and regulators.

## SREEDHARI DESAI

Assistant Professor of Organizational Behavior, Ph.D., University of North Carolina, Kenan-Flagler Business School

### ETHICS

Managers are selected for executive development because they have demonstrated a great potential for leadership. As they rise within the organizational ranks, one of the inevitable challenges that they will face is the increasingly complex set of decisions that include a mix of management, finance, accounting, marketing and other issues. Inevitably included within these decisions will be a huge component of ethical issues that test the fundamental principles of the company and the individuals within the company. Moreover, leaders often have to make decisions on the fly, with little time to reflect on ethical nuances.

To meet this challenge, this session will focus on the following points:

- Addressing when an issue becomes one that requires ethical decision-making skills
- Assessing which ethical theories make the most sense for business decision-makers
- Analyzing how one makes ethical business decisions
- Analyzing a real-life business case that carries major ethical concerns
- Developing an ethical “rule of thumb” for making ethical decisions quickly and effectively

## HEIDI SCHULTZ

Professor and Director, Management and Corporate Communication, Ph.D., University of North Carolina, Kenan-Flagler Business School

### DEVELOPING AND DELIVERING PROFESSIONAL PRESENTATIONS

Leadership requires mastering the art of effective persuasion. Leaders must be able to communicate both within and outside the organization clearly, concisely and convincingly. Through lecture, discussion, exercises and practice, this session will help participants refine their presentation skills by covering the following topics:

- Organizing presentations effectively and efficiently
- Designing and integrating PowerPoint slides, notes and questions into presentations effectively
- Delivering information with confidence

### OUTDOOR TEAM-BUILDING EXERCISE

Every manager recognizes the importance of building cohesive, productive and resilient teams. Key components of team building include excellent communication among members, high levels of trust, norms of collaboration and dedication to achieving the team's goals. Through a series of challenging outdoor exercises, participants will develop new insights on teamwork and collaboration.

# AFSA LEADERSHIP DEVELOPMENT PROGRAM

## **SREEDHARI DESAI**

Assistant Professor of  
Organizational  
Behavior, Ph.D.,  
University of  
North Carolina,  
Kenan-Flagler Business  
School

## **NEGOTIATIONS**

Most business executives lack confidence as negotiators. When queried, they often indicate a dislike of negotiating because they dislike conflict, hate confrontation, don't think quickly on their feet and cave too quickly to the other side's demands. This session will address these fears and misgivings with an explanation of what actually works in negotiation and what rarely works. The primary focus will be on learning the techniques of what is often referred to as "principled negotiation," "interest-based negotiation" or simply "win-win" negotiation. We explore how these techniques are usually superior to more attack-oriented negotiation approaches, but we also learn how to deal with those who approach bargaining with a win-lose attitude.

Because negotiation is a skill, rather than simply a body of knowledge, we do a substantial amount of learning by engaging in negotiation exercises and address the following topics:

- Why good negotiators think they are ineffective
- Attributes of good negotiators as shown by studies
- Techniques for principled negotiation, interest-based negotiation, also known as win-win negotiation
- How to open and conduct a negotiation
- Tips and techniques of great negotiators
- Reflections on negotiations conducted during the day's session

## **BEN ROSEN**

Hanes Professor of  
Management, Ph.D.,  
University of North  
Carolina, Kenan-Flagler  
Business School

## **EXPERIENCE CHANGE SIMULATION**

Every executive has been a part of organizational change, both as a leader and as a participant. Yet, many change efforts don't produce the desired effect that those leading the change effort wished for. This common issue has resulted in significant research with practical implications for managers and executives who want to increase the likelihood of the change initiative having lasting results.

This session will draw on both the research and experience of the executives on ineffective and effective strategies for change management and overcoming resistance to change. A key component of this session will be a simulation where participants will work in teams as consultants for a technology company that has declining revenues and profits. Each team's goal is to navigate the change process to enhance the company's chances for improved competitiveness and survival. After the simulation, participants will tie theory to practice and leave with practical tools and strategies to add to their "management database."

Key concepts include:

- Developing a structured approach to diagnosing, planning and implementing organizational change
- Analyzing and discussing practical tools to help executives lead change
- Test thinking on managing change, using a change management simulation
- Applying lessons on managing and leading change that apply to each executive's area of responsibility
- Discussing strategies for leading change that draw from both research and experience
- Creating effective strategies to manage resistance to change

## **CHRIS STINEBERT**

President & CEO,  
American Financial  
Services Association

## **COMPETITIVE ENVIRONMENT**

Meet AFSA's leader and get up to date on critical regulatory issues affecting the consumer finance industry. You will have an opportunity to ask questions.

# GENERAL INFORMATION AND REGISTRATION

## **ENROLLMENT**

Open to individuals associated with financial services, including diversified financial institutions, consumer and sales finance companies, credit card companies, retail companies, auto finance companies and independently owned and operated finance companies.

## **CERTIFICATE**

Participants who successfully complete the requirements of the program will be awarded a certificate of completion and Continuing Education Units (CEUs). Attendance at graduation on Friday night, July 21<sup>st</sup> is a mandatory requirement to complete the program.

## **ARRIVAL/DEPARTURE**

Participants should plan to arrive on Saturday, July 15th. A reception is planned for Saturday evening. Classes begin on Sunday morning. Departure can be scheduled for Saturday morning, July 22<sup>nd</sup>.

## **DRESS/CLIMATE**

Business-casual attire such as sports shirts and long pants is appropriate for class sessions. Athletic wear is necessary for the Ropes Course. Daytime temperature can range from the mid 80s-90s with moderate humidity. Evening temperature is in the mid-80s to 90s.

## **AIRPORT**

Raleigh/Durham International Airport is the nearest airport to Chapel Hill. Transportation to the Rizzo Center is available by reservation with Brad's Transportation 1-800-467-3302. The cost for this service is \$129.50 per person for a round trip which includes gratuity. If using Brad's, please identify yourself as an Executive Education participant. Taxis are available outside of the baggage claim area at the airport. Rental car companies are located at the airport as well. The airport is 25-35 minutes from the Rizzo Conference Center depending on traffic.

## **ACCOMMODATIONS**

Participants will be staying at the Paul J. Rizzo Conference Center at Meadowmont. The center, set in a 28-acre wooded environment, provides an ideal setting for learning. The state-of-the art facility is comprised of three separate buildings—Loudermilk Hall contains the classrooms; McLean Hall offers 120 guest rooms, three seminar rooms, study rooms with telecommunications ports, and a full health club; and DuBose House, a Georgian Revival house, serves as a social center.

## **KENAN-FLAGLER BUSINESS SCHOOL**

In early June, UNC Executive Education will email you a password and the link to access course reading materials and logistics.

## **CANCELLATION POLICY**

Due to the fact that participants will be required to read articles, books and case studies in advance, cancellations must be submitted in writing and are subject to the following policy:

- Cancellation of enrollment or substitutions will be accepted on or before June 12, 2017; a full refund will be issued.
- No refunds will be made after June 12, 2017; substitutions will be accepted.

## **PROGRAM FEE: \$7,600 (FEE MUST BE PAID IN FULL PRIOR TO BEGINNING OF PROGRAM)**

The fee includes all instructional materials, classroom facilities, housing for seven nights with breakfast, transportation to program activities, reception on Saturday, evening dinners on Monday, Tuesday, Wednesday, and Friday and lunch for five days.

# REGISTRATION

## ONLINE REGISTRATION:

<http://www.afsaef.org/Management-Development-Programs/Leadership-Development-Registration>

### REGISTRATION DEADLINE: JUNE 12, 2017

#### REGISTRANT INFORMATION

(Please print or type)

Name \_\_\_\_\_  
Last First Badge Nickname

Position/Title \_\_\_\_\_ Company Name \_\_\_\_\_

Business Address \_\_\_\_\_ City/State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

#### EDUCATION

College or University (if applicable, but not required) \_\_\_\_\_ Degree Obtained \_\_\_\_\_

#### BUSINESS EXPERIENCE

List your experience in the financial field (list most recent position first) and briefly outline your specific job responsibilities.

\_\_\_\_\_  
\_\_\_\_\_

#### COMPANY INFORMATION

Length of time in current position \_\_\_\_\_ Length of time with company \_\_\_\_\_ No. of personnel in company \_\_\_\_\_

Number of your direct reports \_\_\_\_\_ Number of your total reports \_\_\_\_\_

Total Company Assets \$ \_\_\_\_\_ Consumer Credit Outstanding \$ \_\_\_\_\_

#### APPLICATION MUST BE SIGNED BY YOUR SUPERVISOR OR A DESIGNATED COMPANY OFFICIAL

Name \_\_\_\_\_ Title \_\_\_\_\_ Company \_\_\_\_\_

Address \_\_\_\_\_ City/State \_\_\_\_\_ Zip \_\_\_\_\_ E-mail \_\_\_\_\_

Signature of Supervisor/Company Official \_\_\_\_\_ Date \_\_\_\_\_ Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

PROGRAM FEE: \$7,600     Enclosed     Please invoice     Received by AFSAEF

#### SEND COMPLETED APPLICATION AND PAYMENT TO:

Rhonda Ashburn  
AFSA Education Foundation  
919 Eighteenth Street, NW, Suite 300  
Washington, DC 20006-5517

Phone: 202-466-8611  
Email: rashburn@afsamail.org  
Website: www.afsaef.org



AFSA EDUCATION  
FOUNDATION

*Brightening Your Financial Horizon*

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