

WILD

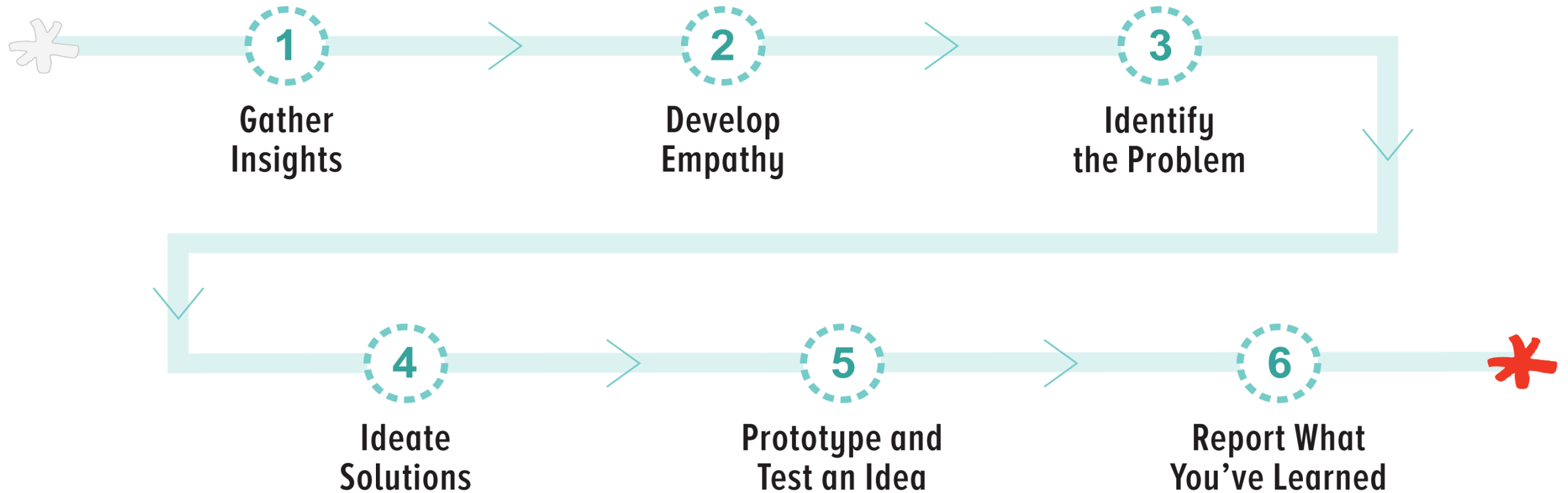
Wisconsin
Innovation
Leadership
Development

- Year FIVE -

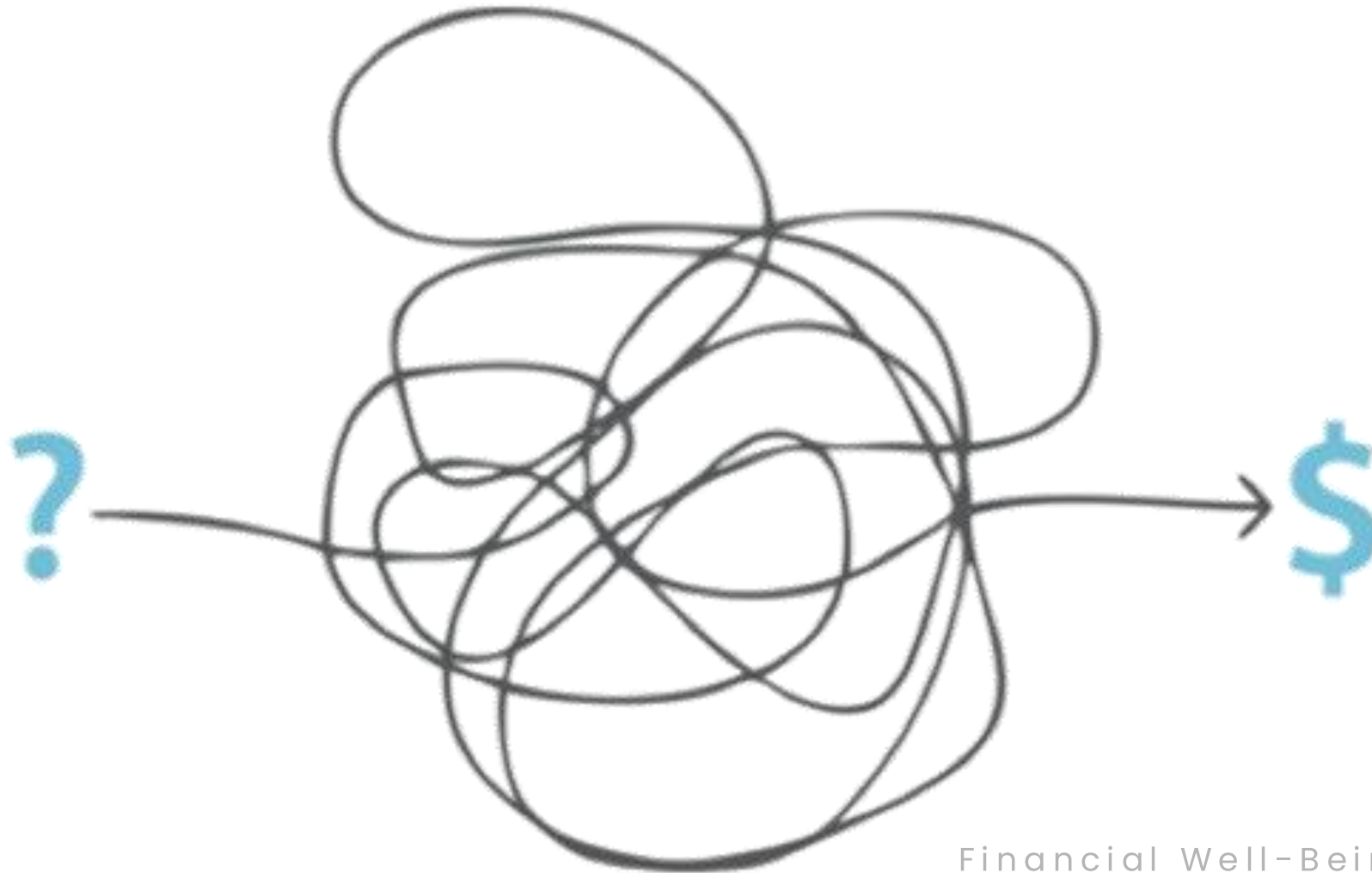
Thank you, Technology Sponsor



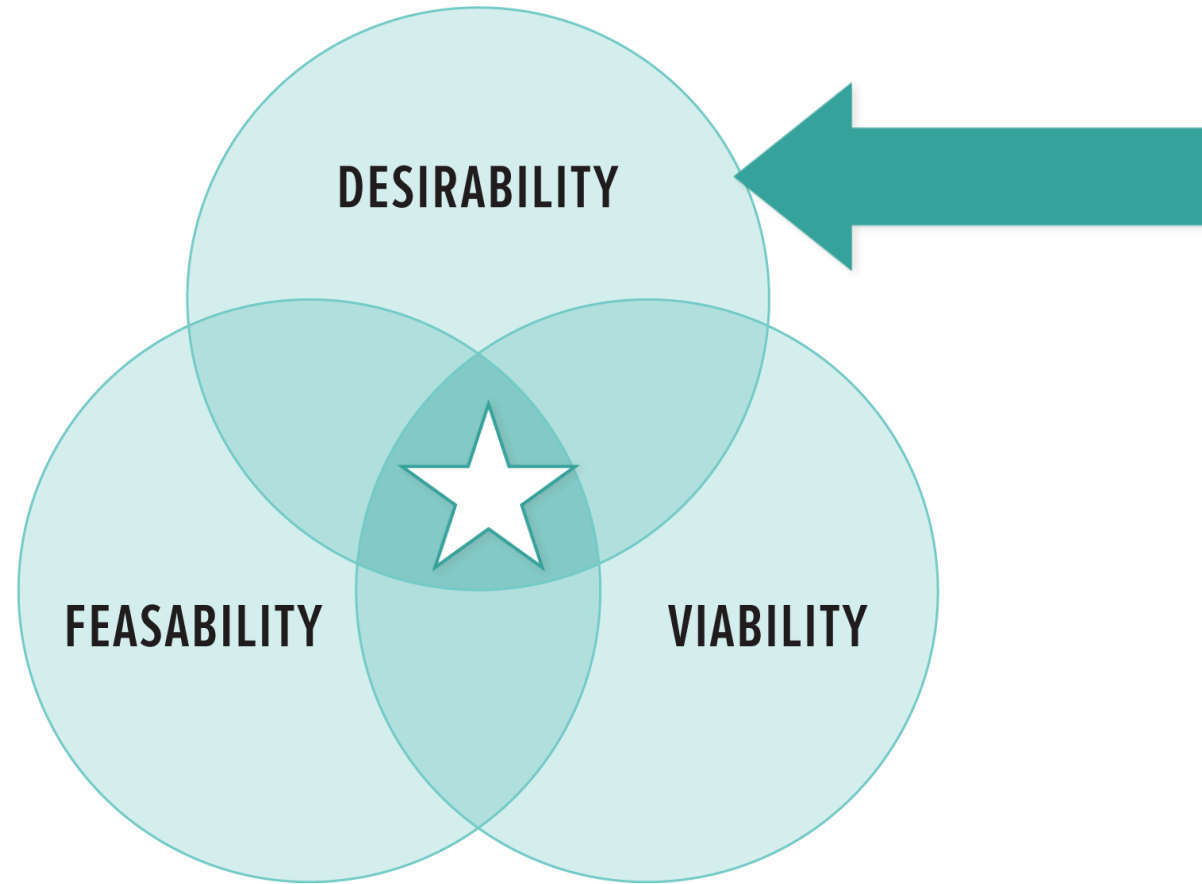
Innovation looks like this...



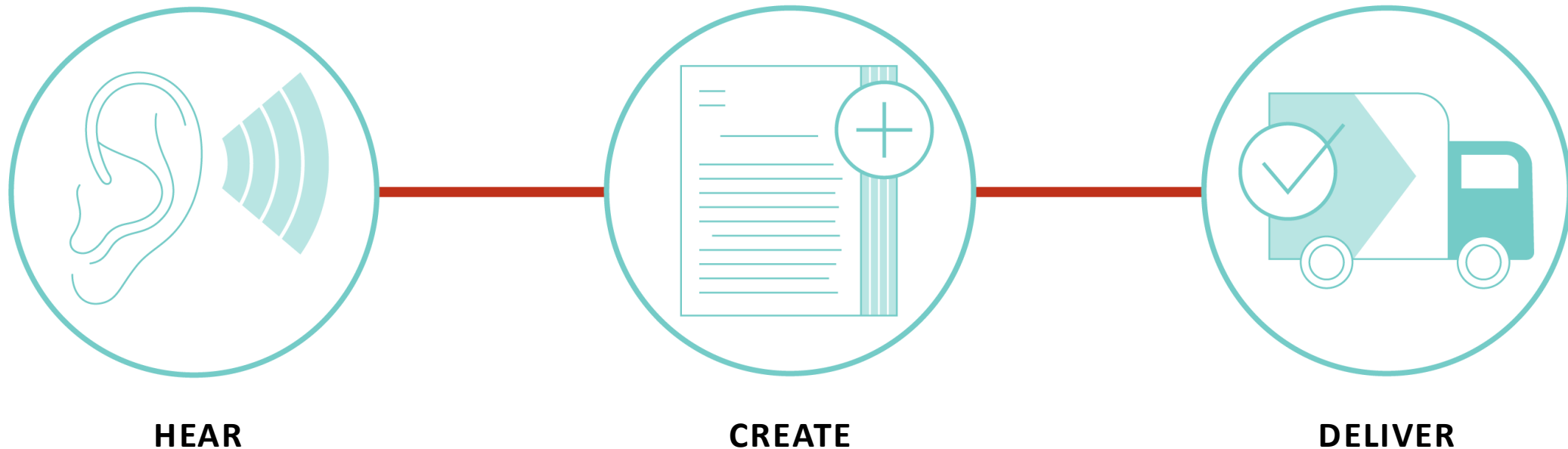
...but feels more like this.



The Power of Human-Centered Design



Why Focus on Human-Centered Design?



KEY LEARNING — *Desirability comes first.*



FIVE Years of Innovation

“

Innovation is applied creativity
in a business environment.

JEFFREY ROBINSON,
FILENE FELLOW

“

The will to innovate is not an abstract,
philosophical idea but is manifested
through the willingness to ask
questions, share ideas, take risks,
and borrow from other fields
or experts.

HAYAGREEVA “HUGGY” RAO,
FILENE FELLOW

WILD: Five Years of Feedback

81%

Positive Impact on
Professional
Development

84%

Response
rate (38
responses)

45

Innovators

81%

Apply learnings to
advance Credit
Union's mission &
goals

78%

Knowledge
Advanced

53%

Net Promoter
Score

Financial Well-Being for All



The Power of WILD

“It truly pushed me further out of how I thought about different problems and created further critical thinking skills. I also was able to broaden my public speaking skills and showcase my leadership abilities which has helped me grow in my career.”

“WILD program changed the way you look and think about problem or product you are looking to develop, correct, or enhance. Working with a group for multiple other Credit Unions and roles helped me understand that not everyone sees the same picture which has helped me to step back and look at things in a more holistic fashion.”



Special Thank you to Tina Liegel!

Innovation Group Participant: 2018
Innovation Group Leader: 2025



Download the Concept Documents



VISIT

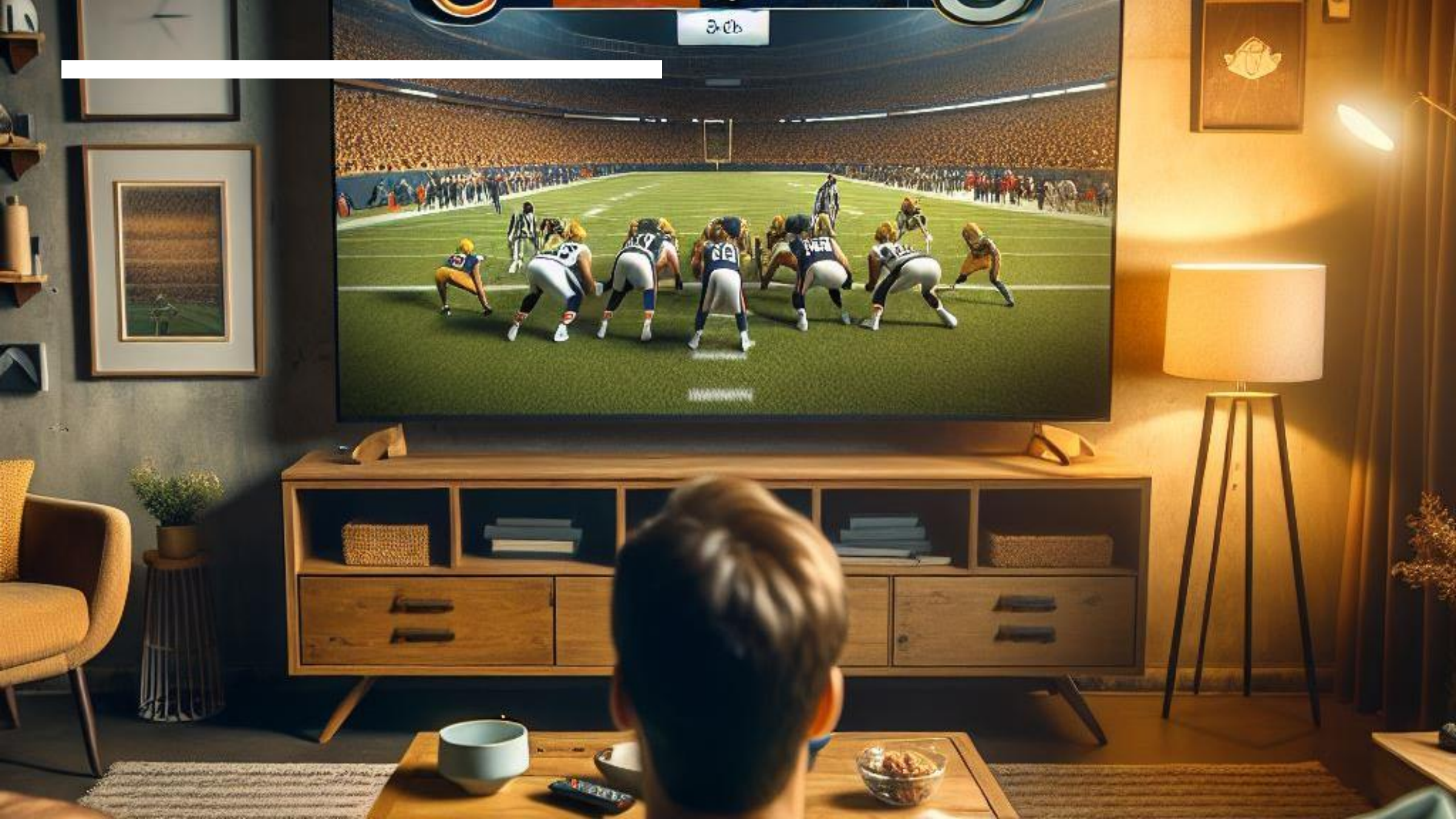
Design Well-Being for All



FUTURE

FORWARD







HOME

ABOUT

PLANNING

CONTACT US

TESTIMONIALS

STEP 1:
INTERIM
SOLUTIONS

STEP 2:
COMMUNICATION
PACKAGE

STEP 3:
ROLE MAPPING
AND STRUCTURE

STEP 4:
ONBOARDING
AND
ORGANIZATIONAL
INTEGRATION

STEP 5:
TRANSITION
PROCESS

Need Help getting
started?
Chat with our virtual
assistant.



Why?



Performance



Quality



Motivation and
engagement



Health and
attendance



Retention



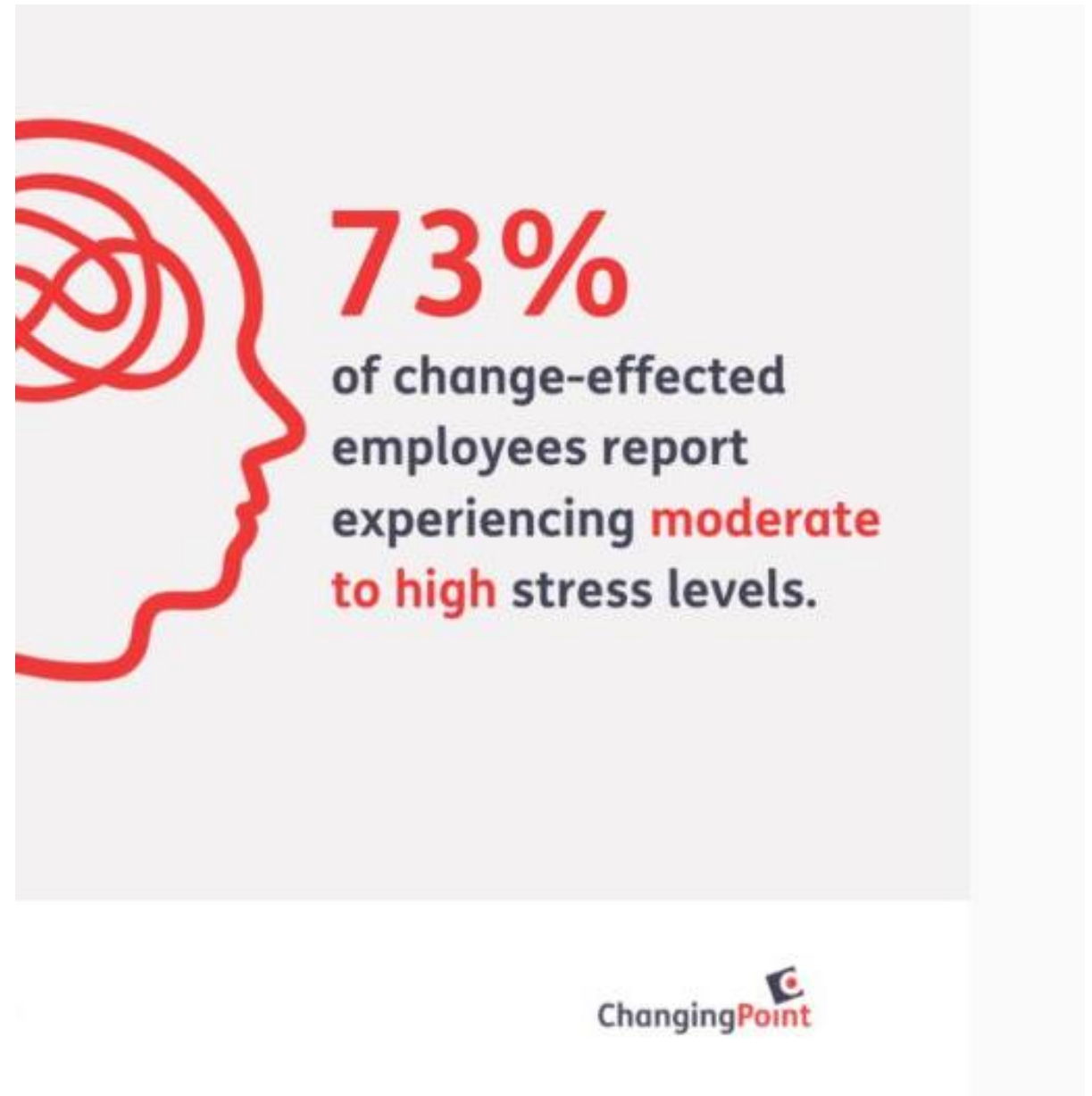
Decision
making abilities

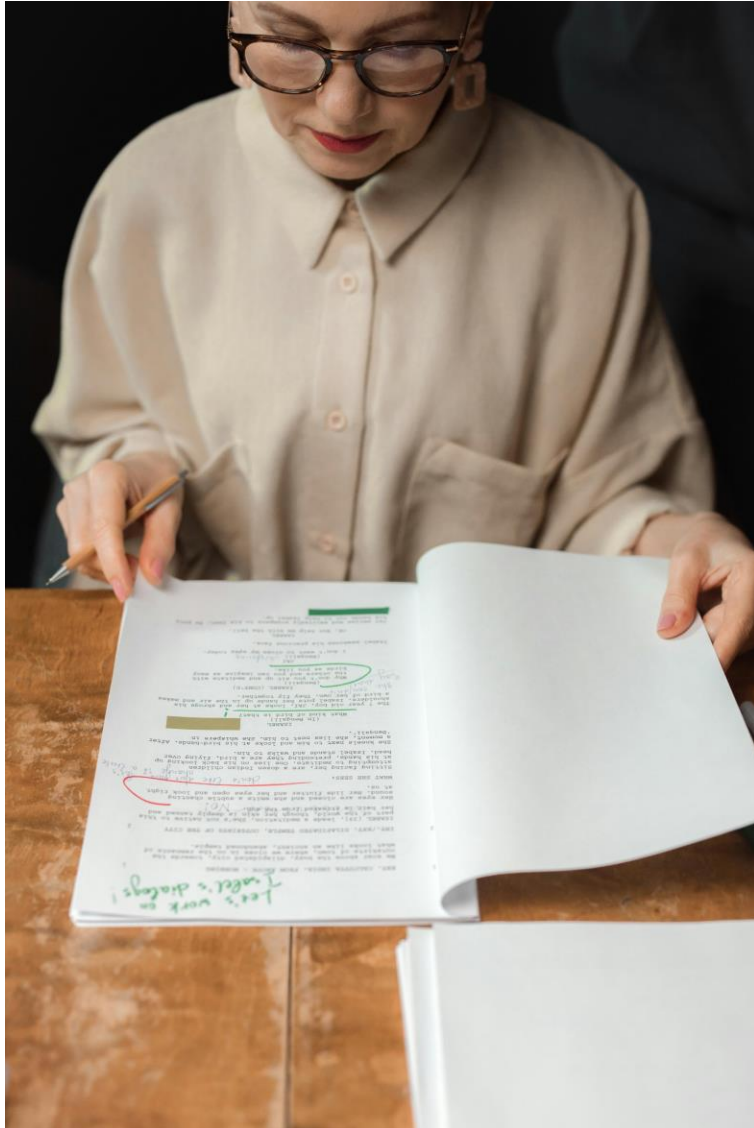


Innovation



Time
Management





What's Next?

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AI Career Navigator

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Rob Carviou – Verve, A Credit Union

Shayna Risch – Blackhawk Community Credit Union

Samantha Zeckmeister – Kohler Credit Union

Thank you, Technology Sponsor



Problem



- **Lack of clear, attainable growth pathways** lead to loss of experienced talent
- Studies indicate **direct correlation** between internal career development and employee retention
- Credit Unions may **lack resources** needed to create a solution that is scalable and adaptable



Problem Statement

"How might we help credit union managers implement scalable and adaptable career development strategies whilst leveraging minimal resources?"

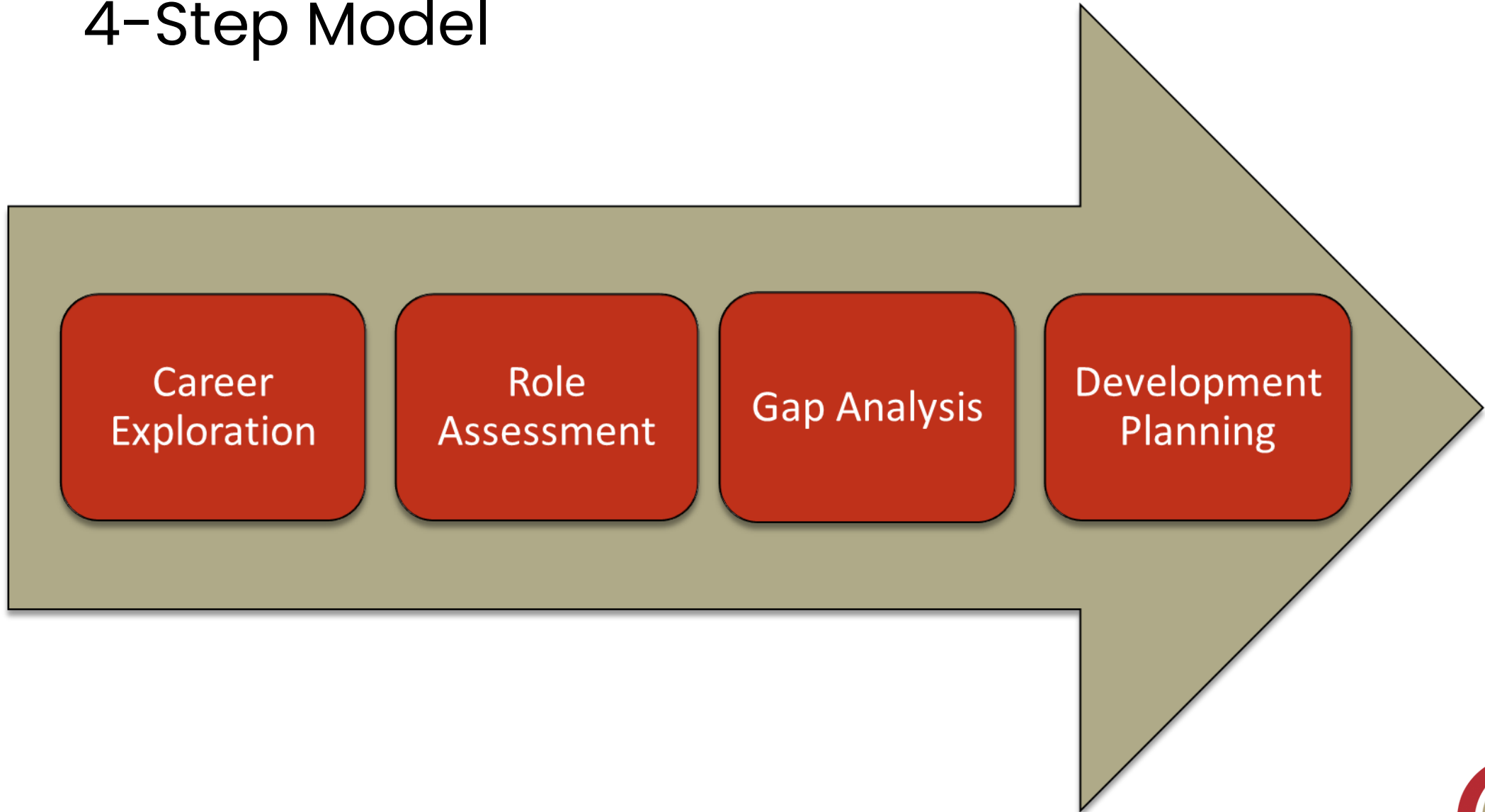
How will Generative AI assist?



- **Learns patterns** from large data sets
- **AI adapts** to your organization to deliver personalized content
- Transforms how we **interact with technology** – more conversational and creative



4-Step Model



Prototype: Prompt Guide

Step 3 – Gap Identification

Prompt

Copy & Paste: “Act as a performance and development coach. Based on the comparison between my current and desired role, help me identify the specific skills, experiences, or behaviors I need to develop to become a strong candidate. Organize these into categories such as technical skills, leadership behaviors, and cross-functional experiences.”

Purpose

This prompt transforms insights from your role comparison into a focused, actionable gap analysis. It removes guesswork and subjectivity from identifying development needs and ensures consistency across teams. The goal is to provide clarity on where growth is needed while also highlighting strength and transferable skills—supporting equitable access to internal advancement opportunities.

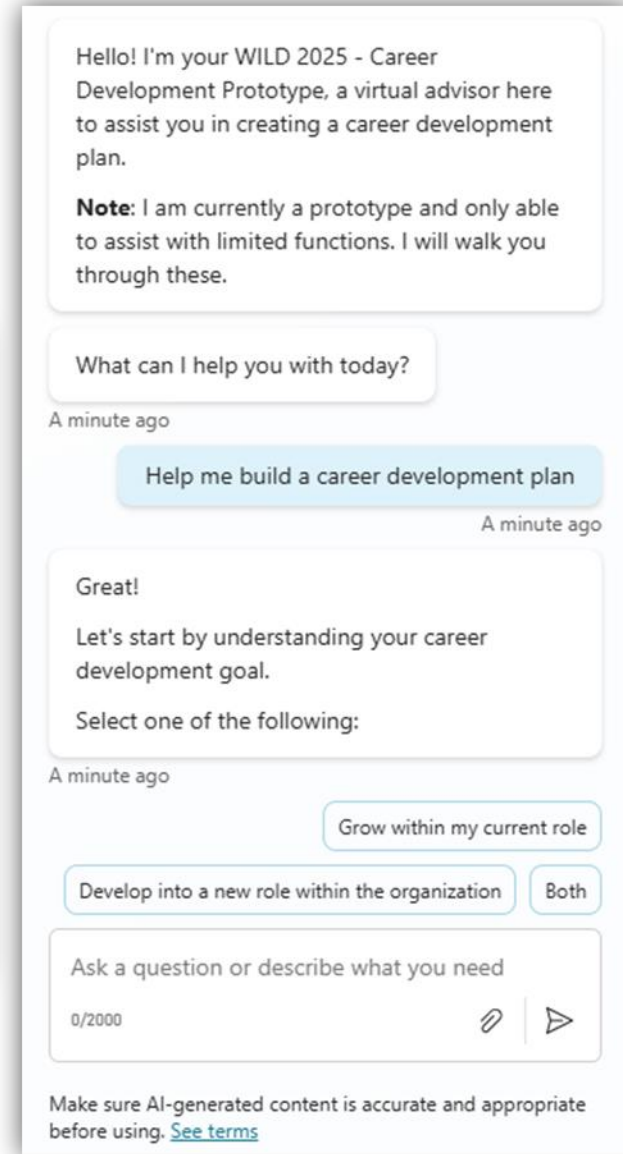
Tips for Navigating the Conversation

1. **Reference Role Comparison Results:** Use the outcomes from Step 2 as the foundation for this conversation.
2. **Group by Themes:** Ask AI to group gaps into categories (e.g., technical, interpersonal, strategic) to simplify planning.
3. **Ask for Examples:** Request real-world examples of how these skills show up in practice.
4. **Include Past Experience:** Tell the AI what projects or responsibilities you’ve already done to get credit for transferable skills.

Role	Persona	Step	Output Summary	Strengths	Weaknesses	Score (1-5)
Member Service Representative	Highly Ambitious	Step 1	Explored Project Manager, Branch Manager, Business Analyst paths	Broader paths explored, strong connection to skills	Slight pushback needed to get beyond just “supervisor” path	4
Member Service Representative	Highly Ambitious	Step 2	Clear skill comparison, definitions provided	Good simple definitions and skill mapping	Self-assessment could have been more deeply challenged	4
Member Service Representative	Highly Ambitious	Step 3	Identified critical gaps; budget and time discussed	Customized learning options (certs vs on-job learning)	Slight redundancy in examples	4
Member Service Representative	Highly Ambitious	Step 4	Prioritized gaps, SMART goals formed, checkpoints created	Good use of SMART, realistic timelines	Milestones could be better tied to job performance metrics	4
Member Service Representative	Cautiously Curious	Step 1	Suggested paths into Compliance, Operations Support, or Training roles	Very user-centered, encouraged open exploration	Needed minor nudging to consider technical roles	4
Member Service Representative	Cautiously Curious	Step 2	Competency definitions <u>user-friendly</u> , clear	Friendly tone, approachable concepts	Slightly shallow proficiency scale	4
Member Service Representative	Cautiously Curious	Step 3	Gaps linked to real concerns	Prioritized real-world issues	Development activities a little basic	3
Member Service Representative	Cautiously Curious	Step 4	SMART goals aligned to comfort-building	Logical, gradual progressions	Timeline could better integrate with current projects	4

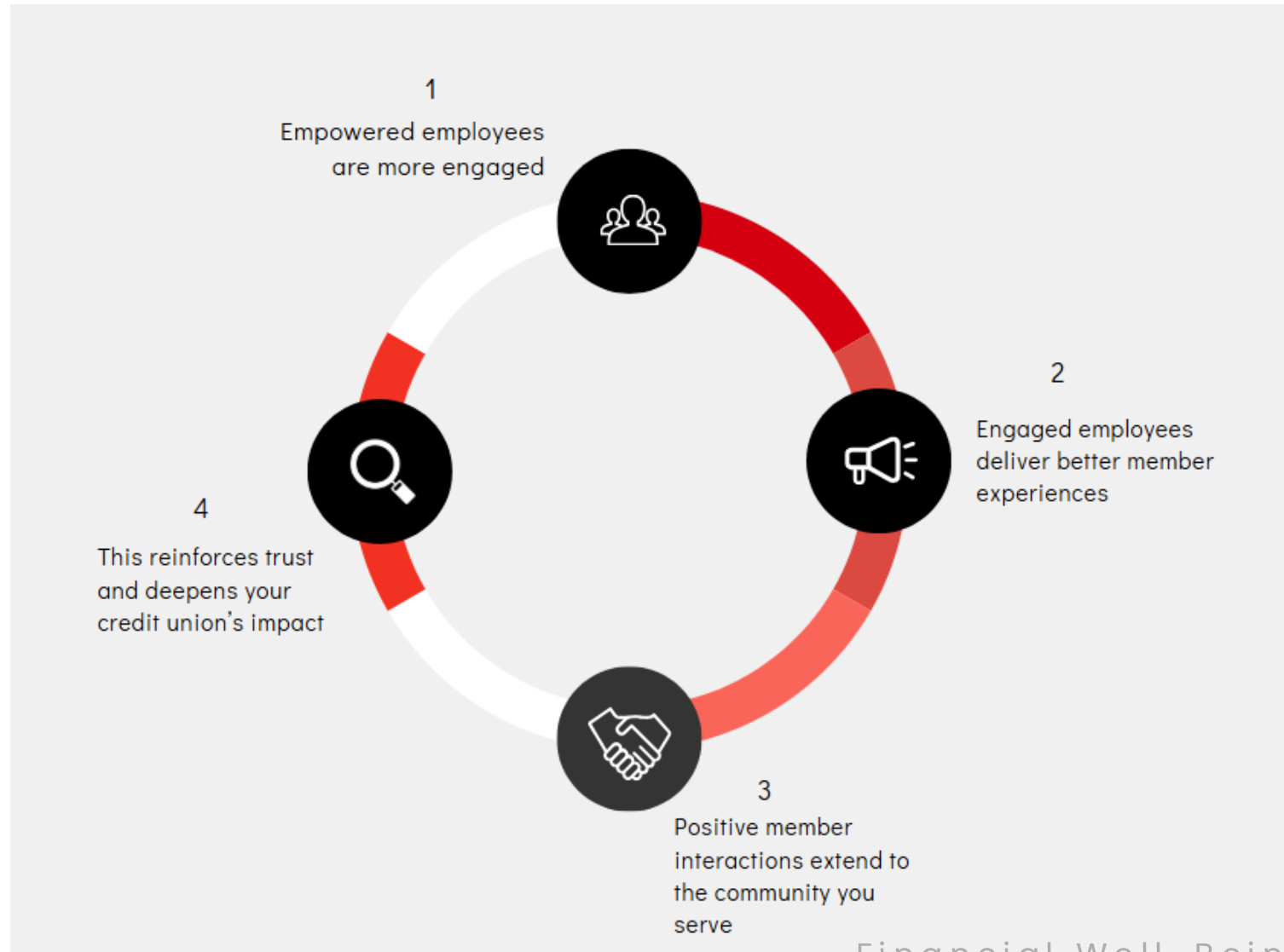


Prototype: Agent



Next Steps

23



Financial Well-Being for All





THANK YOU

Thank you, Technology Sponsor



Search + Rescue

Presented by:
Fources of Change

Thank you, Technology Sponsor





Name

Modified By

Date modified

Location



No items match your search

Try a different search



Hey, can someone
tell me what I
need here?

Knock, Knock, Can I
come in, got a quick
question?

Can you show me how
to do that procedure
again?

Hey, how do I do
that again?

What page do I look for
to find that sheet again?

Have a second to go
over something with
me?



Problem Definition

How might we help frontline staff be more confident in procedural changes?

111 Surveys

67%
Confident

68%
Escalate to
Manager

Financial Well-Being for All

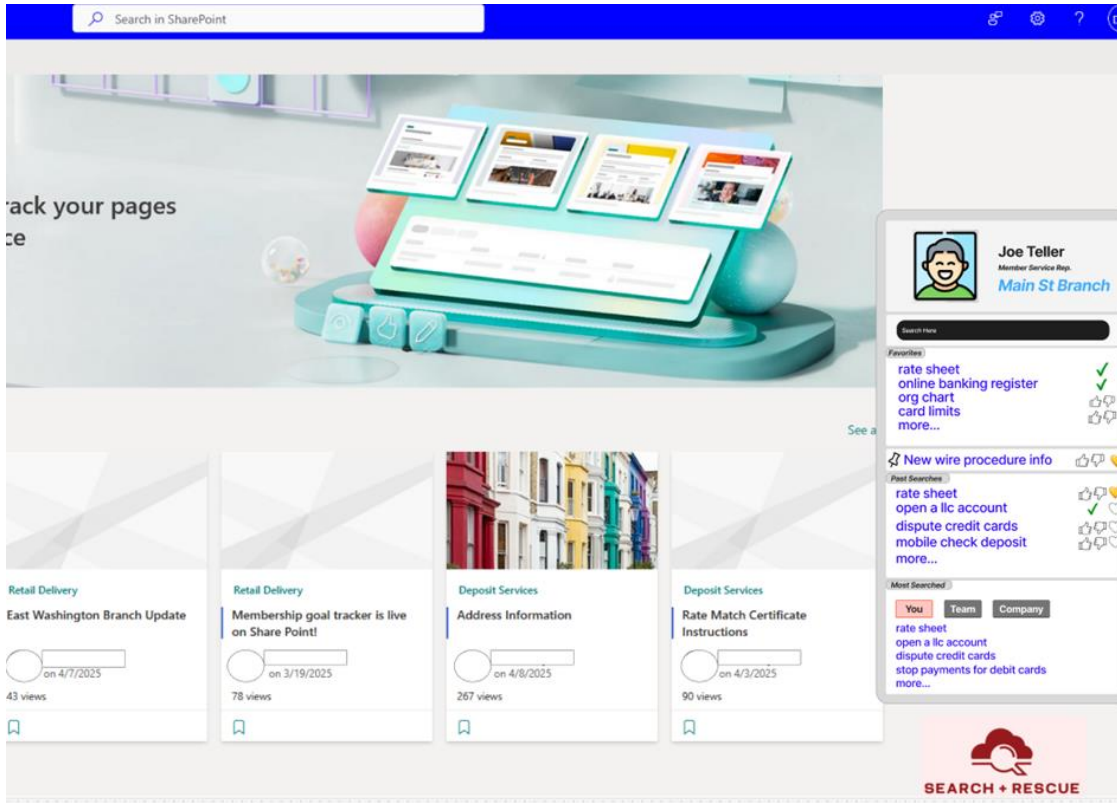




SEARCH + RESCUE



Search in SharePoint



Track your pages
ce

See a

Joe Teller
Member Service Rep.
Main St Branch

Search Here

Favorites

- rate sheet
- online banking register
- org chart
- card limits
- more...

New wire procedure info

Past Searches

- rate sheet
- open a llc account
- dispute credit cards
- mobile check deposit
- more...

Most Searched

You **Team** **Company**

- rate sheet
- open a llc account
- dispute credit cards
- stop payments for debit cards
- more...

Retail Delivery
East Washington Branch Update
on 4/7/2025
43 views

Retail Delivery
Membership goal tracker is live on Share Point!
on 3/19/2025
78 views

Deposit Services
Address Information
on 4/8/2025
267 views

Deposit Services
Rate Match Certificate Instructions
on 4/3/2025
90 views

SEARCH + RESCUE

Joe Teller
Member Service Rep.
Main St Branch

Search Here

Favorites

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New wire procedure info

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- more...





Joe Teller
Member Service Rep.
Main St Branch

Favorites

rate sheet
online banking register
org chart
card limits
more...

✓
✓
👍👎
👍👎

New wire procedure info 👍👎👉

Past Searches

rate sheet
open a llc account
dispute credit cards
mobile check deposit
more...

👍👎👉
👍👎
👍👎
👍👎
👍👎

Most Searched

YouTeamCompany

rate sheet
open a llc account
dispute credit cards
stop payments for debit cards
more...

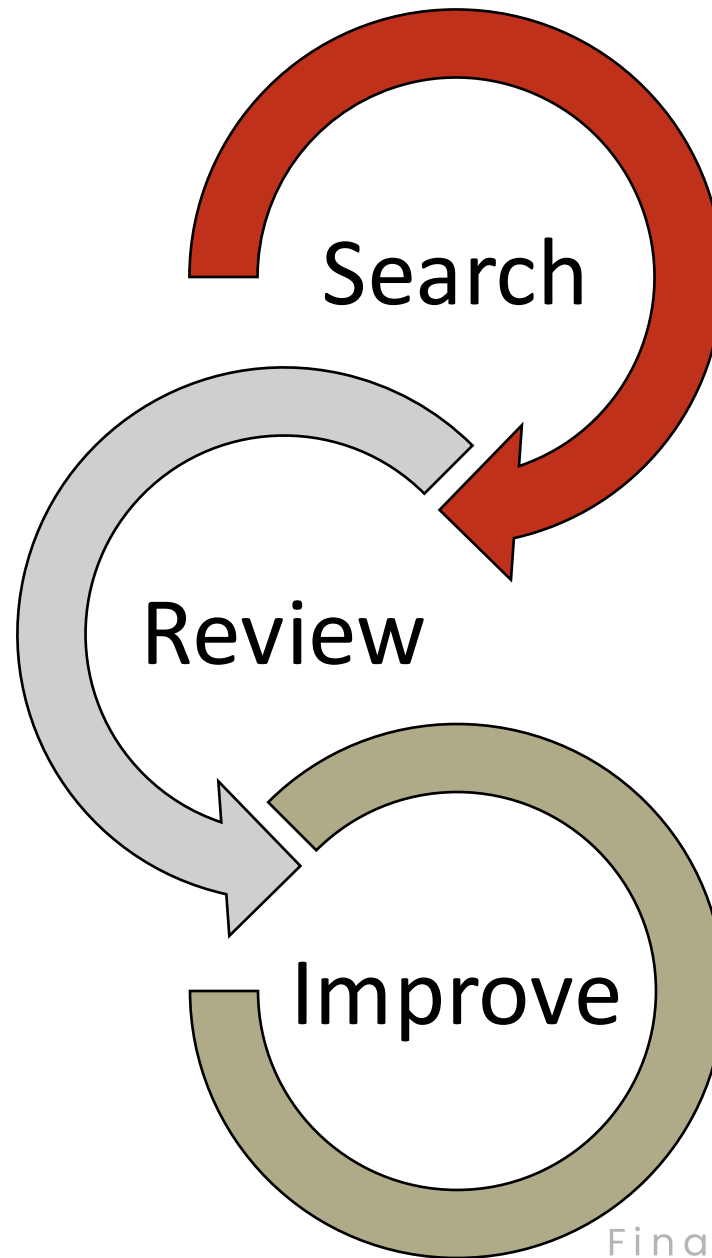
Help us improve! X

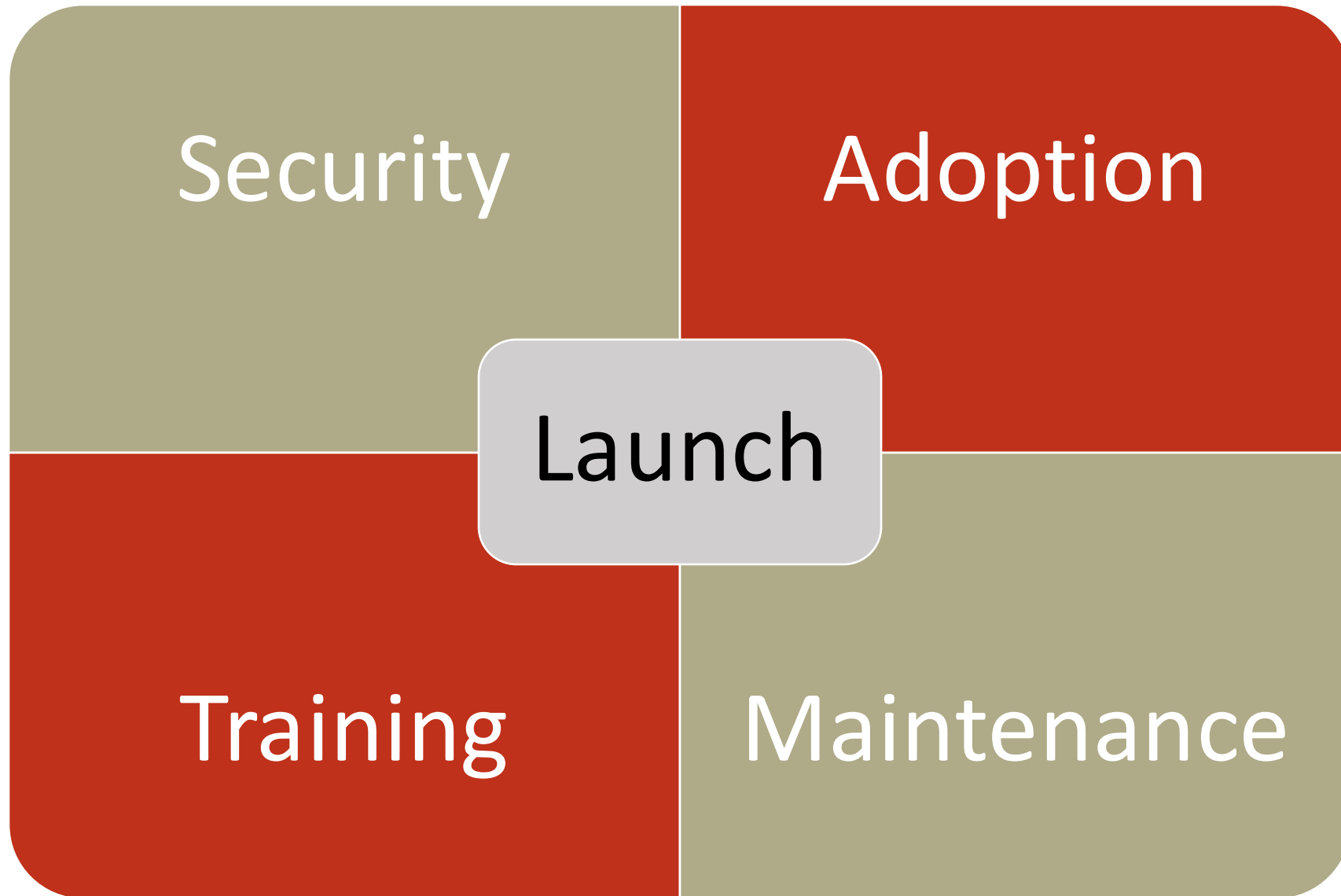
☐ Zero results
☐ Results not what I needed
☐ Source info needs updating
☐ Source info needs replacing

Additional info if needed

Submit









SEARCH + RESCUE





THANK YOU

TEAM MEMBERS

[Daniel Mijal, Heartland Credit Union]

[Dayna Wimann, Blackhawk Community Credit Union]

[Donna Vankham, United One Credit Union]

[Kendra Lozano, Fort Community Credit Union]

Thank you, Technology Sponsor



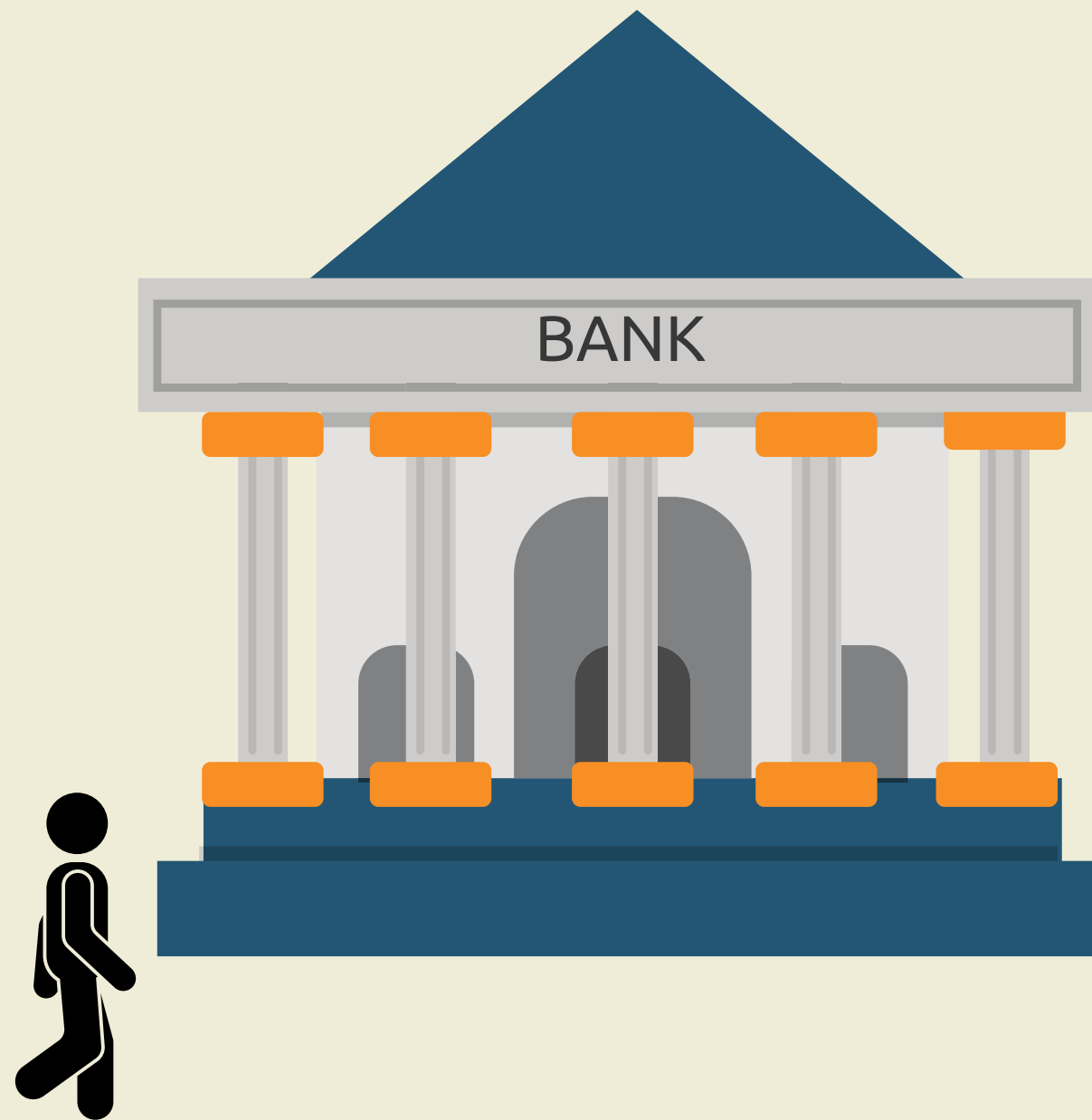
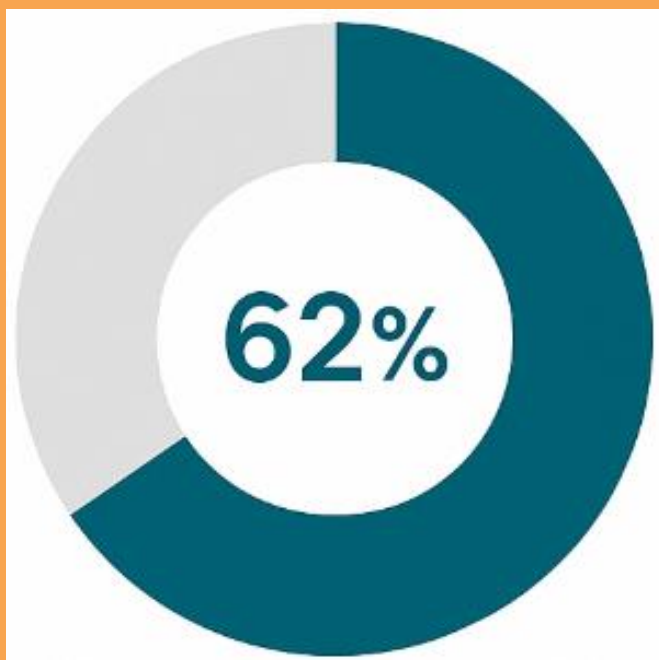
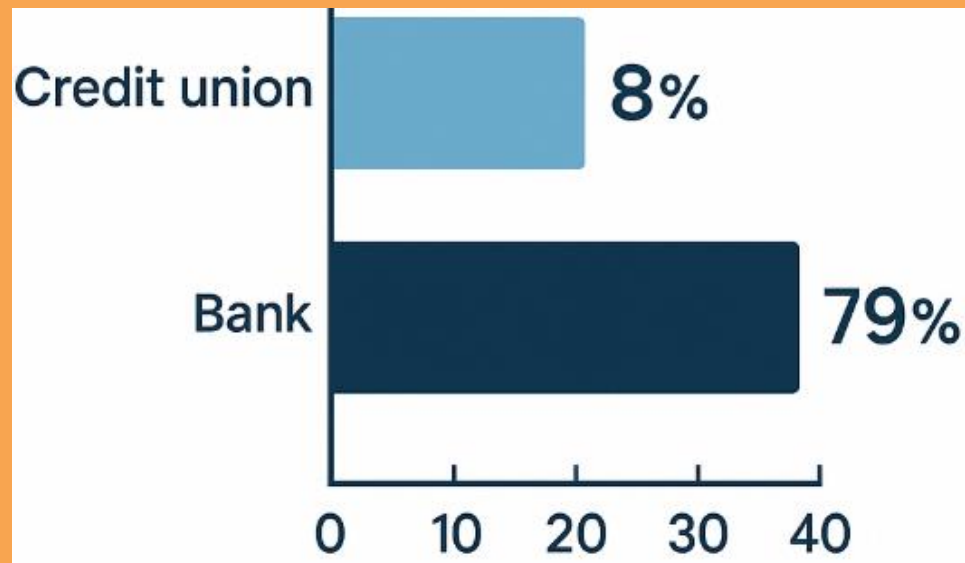
VISION

To Venture



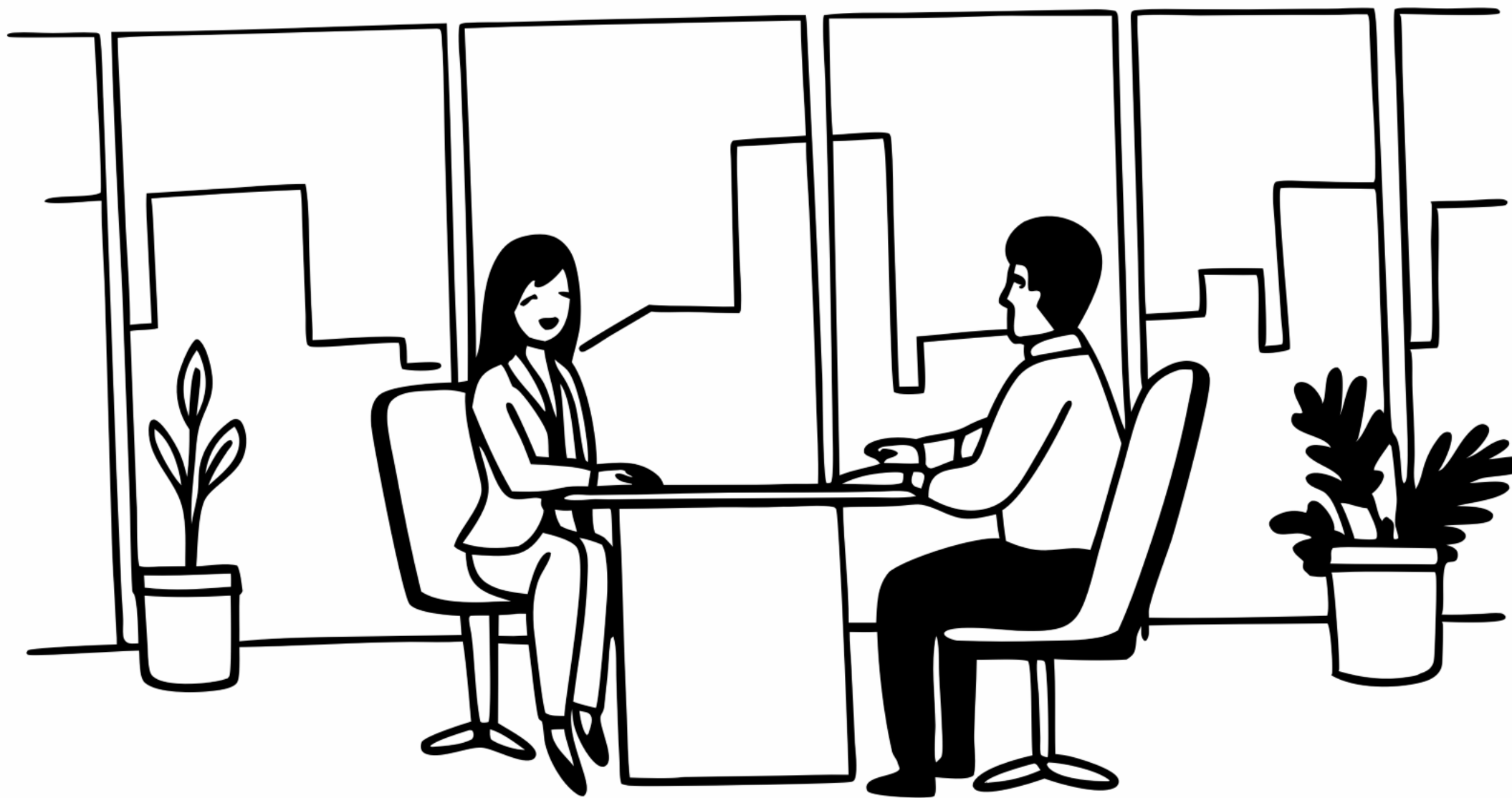
Presented by: Raeann, Laura, Becky, Ashlie













CREDIT UNIONS

VISION TO VENTURE

ATTRACTING NEW BUSINESS ACCOUNTS

PROMOTING LENDING OPPORTUNITIES

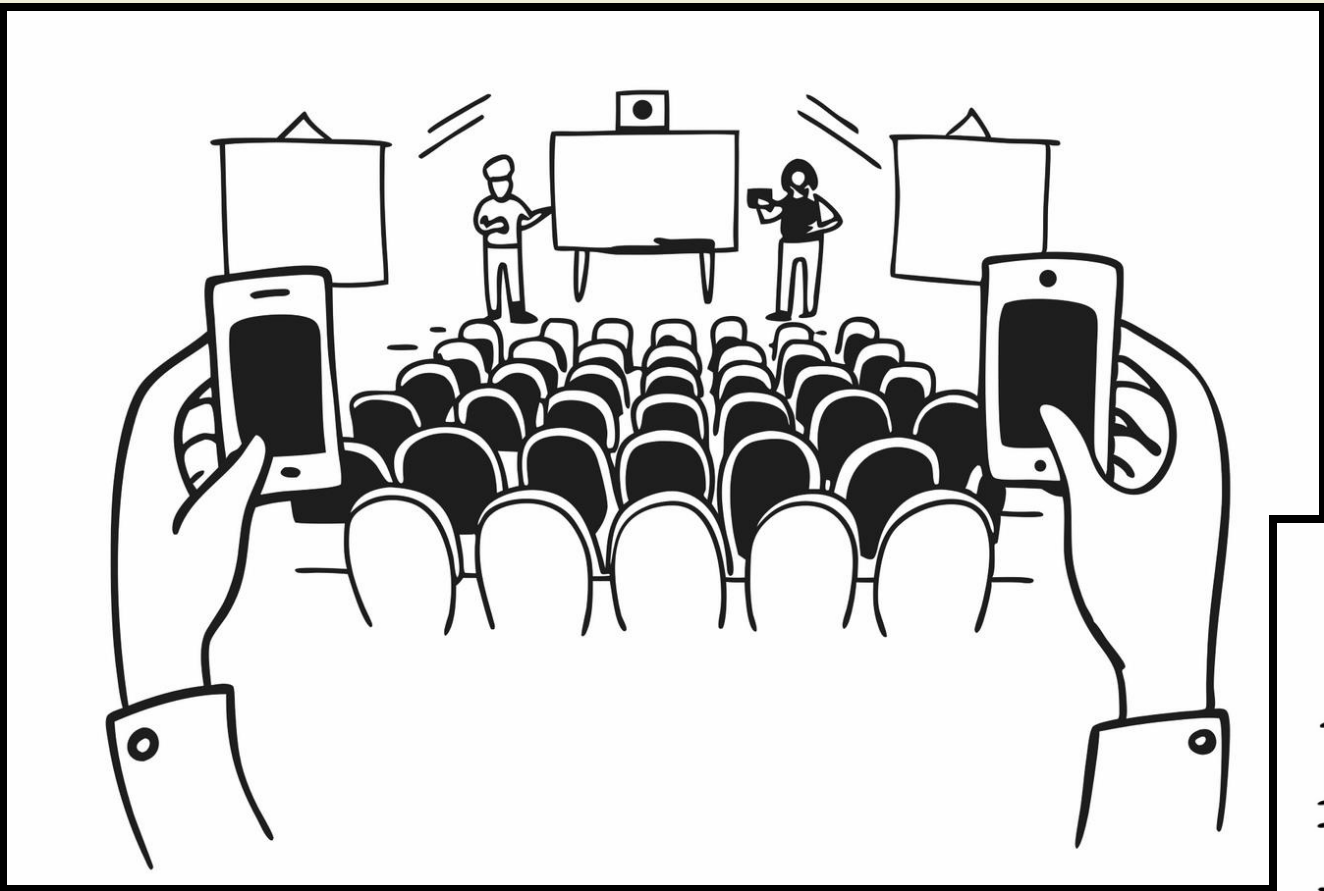
Fostering Stronger Ties with the Community

Marketing Events

Partnering with Local Businesses

Grow Membership





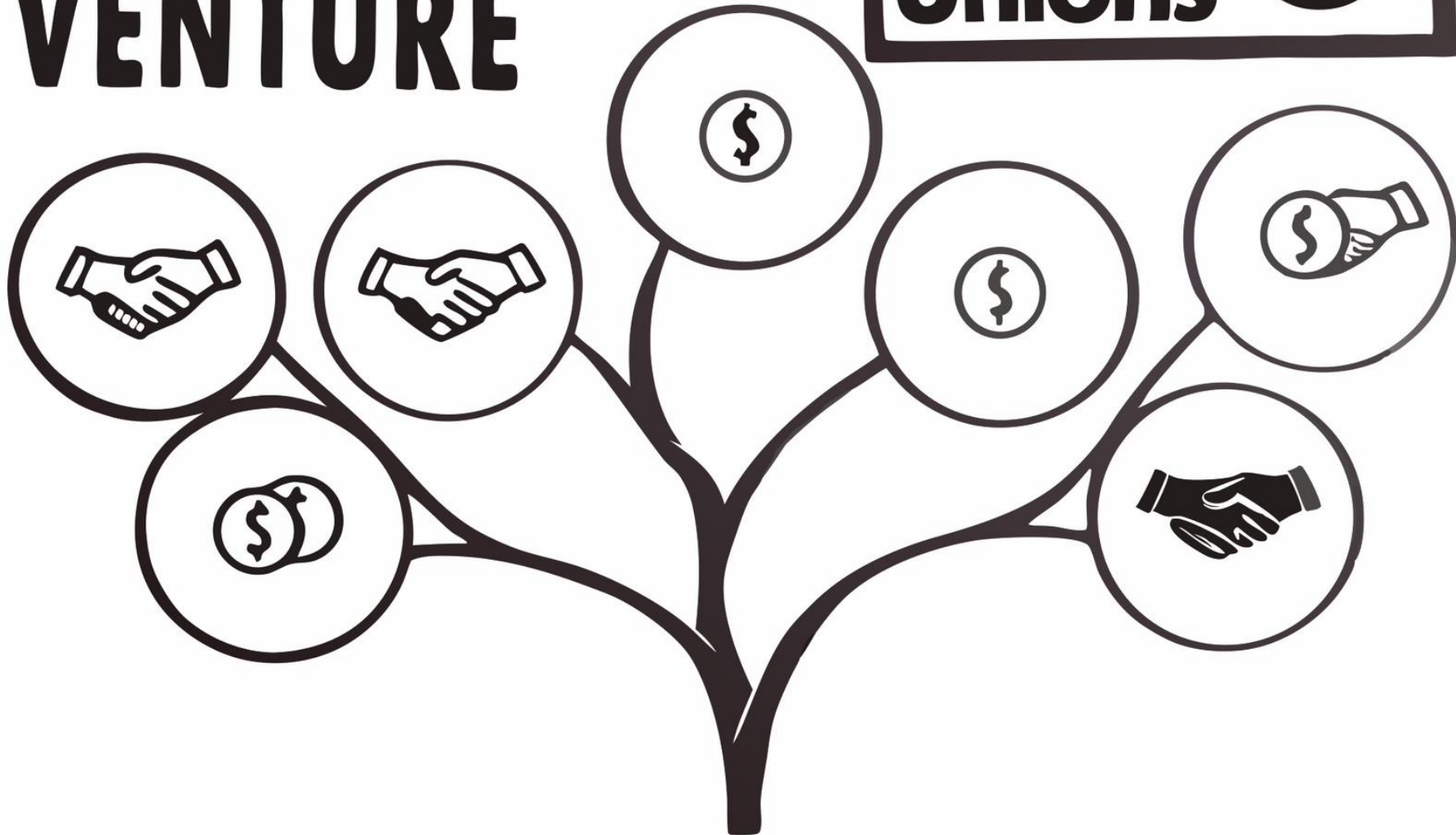




WINNER

VISION TO VENTURE

**Credit
Unions**









VISION

To Venture



Empower Entrepreneurs - Strengthen Communities - Vision to Venture

Download the Concept Documents



VISIT

Design Well-Being for All





THANK YOU

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