

# ENTERPRISE UNIVERSITY

Better your business knowledge. One course at a time.



# Welcome to Enterprise University

After more than a decade, Enterprise University has reached over 17,500 leaders through industry-relevant education and the network built during each class. This program has become an integral part of our bank, and we are proud to make it a community resource available to all at no cost.

Our practical, in-depth courses will challenge and energize you with presenters who have lived what they're teaching, coupled with real-world perspective from your peers.

Every day you're bombarded with more information, challenges and changes. Those who attend our classes tell us they provide them a new framework from which to reflect on and approach the important work they do on a daily basis. You do not have to be a client of Enterprise Bank & Trust, and there is no sales pressure from the bank or the presenters.

We encourage you to take advantage of this opportunity and arm yourself with insights that support your personal growth and help you pay it forward by elevating the communities we live in.

Sincerely,

**Jim Lally**

**President and CEO**

Enterprise Financial Services Corp

**Scott Goodman**

**President**

Enterprise Bank & Trust

**Doug Bauche**

**President, St. Louis Market**

Enterprise Bank & Trust

## Schedule at a Glance

**Networking and registration starts at 8:00 a.m.**  
**All classes begin at 8:30 a.m. and conclude by 11:30 a.m.**

### MARCH

26	With the right people in the right seats – magic happens!	Creve Coeur	p. 14
28	Has your business turned into a house of cards?	Creve Coeur	p. 17
29	Speak like a pro to deliver your message effectively	Creve Coeur	p. 20

“ It was great to learn from a fellow member of the business community. ”

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### APRIL

2	You don't own control of your brand – your consumer does	Creve Coeur	p. 21
3	Time is money: Discover the difference between opportunity and hard cost	Creve Coeur	p. 11
5	What is EQ and why should I care?	Creve Coeur	p. 14
10	Conflict and change: Still necessary, no longer evil	Creve Coeur	p. 19
11	Competitive intelligence: Harnessing CI for maximum value in your company	Creve Coeur	p. 20
12	Is franchising right for you?	Creve Coeur	p. 19
16	The most important asset not on your balance sheet: The engaged employee	Creve Coeur	p. 15
16	Where do I begin? Create and implement a healthy financial plan	Perryville	p. 10
17	Where do I begin? Create and implement a healthy financial plan	Creve Coeur	p. 12
18	The A.R.T. of leading by example: How to be authentic, relatable and transparent	Creve Coeur	p. 17

## Schedule at a Glance

REGISTER AT [ENTERPRISEBANK.COM/EU](https://www.enterprisebank.com/eu)

**Networking and registration starts at 8:00 a.m.**  
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### APRIL

19	Making QuickBooks™ your tool, not your frustration	Creve Coeur	p. 12
26	Top 10 costly HR mistakes to avoid	Creve Coeur	p. 15
30	The brand called “YOU”	Creve Coeur	p. 22

“ I left with ideas that will help  
take my business to the next level. ”

## Schedule at a Glance

**Networking and registration starts at 8:00 a.m.**  
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### MAY

1	Content marketing: Win by educating and entertaining your target market	Jefferson College	p. 22
3	Planning the retirement you'll want to live in	Jefferson College	p. 9
7	Sales management for non-sales executives	Creve Coeur	p. 18
9	How to stand out in today's digital landscape	Creve Coeur	p. 21
10	Cyber fraud: What every business executive should understand and do about it	Creve Coeur	p. 9
15	I gave them feedback and they still haven't changed	Creve Coeur	p. 16
16	The new tax law and you: What business owners should know	Creve Coeur	p. 13
17	Top 10 costly HR mistakes to avoid	Jefferson College	p. 15
22	The new tax law and you: What business owners should know	Jefferson College	p. 13

# Audiences

We have included audience markers to help you identify which classes might be best for you. Look for these markers next to each course description. Certificates of attendance are available upon request.



**BUSINESS LEADERS**



**EVERYONE**



**FINANCE**



**HUMAN RESOURCES**



**INFORMATION TECHNOLOGY**



**MARKETING & SALES**

# Locations

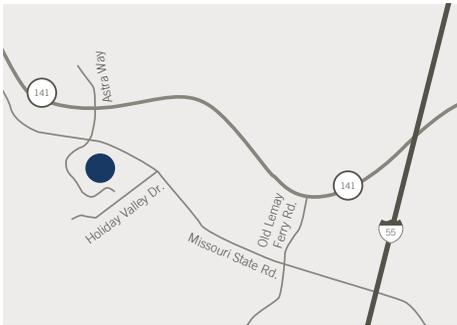
REGISTER AT [ENTERPRISEBANK.COM/EU](http://ENTERPRISEBANK.COM/EU)

## CREVE COEUR



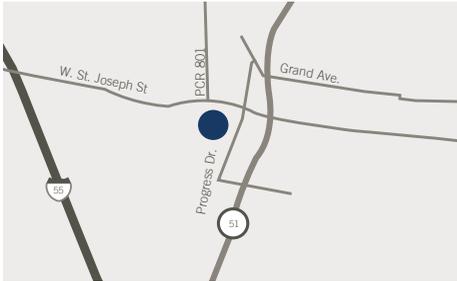
Enterprise Bank & Trust  
11401 Olive Blvd.  
Creve Coeur, MO 63141

## JEFFERSON COLLEGE



1687 Missouri State Rd.  
Arnold, MO 63010  
Courses hosted in Lecture Room 202

## PERRYVILLE AREA HIGHER EDUCATION CENTER



108 S Progress Dr.  
Perryville, MO 63775

## Finance

### CYBER FRAUD: WHAT EVERY BUSINESS EXECUTIVE SHOULD UNDERSTAND AND DO ABOUT IT

**David Hartley**

*Principal, UHY Advisors*

Learn to protect and defend against dangerous threats to your organization.

- Understand the nature of cyber fraud risk
- Protect against cyber fraud within your organization
- Empower and educate employees and customers about cyber fraud risks

**SESSION:**

Friday, May 10

**LOCATION:**

Creve Coeur

**AUDIENCE:**



### PLANNING THE RETIREMENT YOU'LL WANT TO LIVE IN

**Rich Faeth**

*VP, Wealth Advisor*

Enterprise Bank & Trust

**Patrick O'Neil**

*SVP, Senior Portfolio Manager*

Enterprise Bank & Trust

**Bryan Barts**

*Wealth Manager*

Enterprise Bank & Trust

Learn strategies to help secure the life you and your loved ones deserve, long after retirement.

- Evaluate risks to your retirement plan
- Ensure your assets outlive you
- Understand how to effectively allocate your assets

**SESSION:**

Friday, May 3

**LOCATION:**

Jefferson College

**AUDIENCE:**



## WHERE DO I BEGIN? CREATE AND IMPLEMENT A HEALTHY FINANCIAL PLAN

**Rich Faeth**

*VP, Wealth Advisor, Enterprise Bank & Trust*

**Bryan Barts**

*Wealth Manager, Enterprise Bank & Trust*

Find out where you stand in relationship to your wealth accumulation, retirement funding, estate planning and financial goals.

- Understand key areas of personal financial planning
- Analyze how to protect your family and future generations from unforeseen risk
- Develop a plan that will put you on the path to future success

**SESSION:**  
Tuesday, April 16

**LOCATION:**  
Perryville

**AUDIENCE:**  
 

“ I am leaving today with improved goals and ideas. I appreciate Enterprise Bank & Trust offering this to the community. ”

## TIME IS MONEY: DISCOVER THE DIFFERENCE BETWEEN OPPORTUNITY AND HARD COST

**Saeed Akbani**

*COO and Co-Owner, Data Dynamics*

Decision-makers often look at cash impact as the only cost while forgetting opportunity cost.

- Identify and include opportunity cost in decision-making
- Evaluate alternative options and compute economic profits
- Calculate explicit and implicit costs utilizing case scenarios

**SESSION:**

Wednesday, April 3

**LOCATION:**

Creve Coeur

**AUDIENCE:**



“ Great content with knowledgeable and personable speakers. I left with useful and practical advice to apply on a day-to-day basis. ”

## Finance

### WHERE DO I BEGIN? CREATE AND IMPLEMENT A HEALTHY FINANCIAL PLAN

**Deborah Smiley, JD, CFP, AEP**

*Wealth Management Advisor, Enterprise Bank & Trust*

Find out where you stand in relationship to your wealth accumulation, retirement funding, estate planning and financial goals.

- Understand key areas of personal financial planning
- Analyze how to protect your family and future generations from unforeseen risk
- Develop a plan that will put you on the path for future success

**SESSION:**

Wednesday, April 17

**LOCATION:**

Creve Coeur

**AUDIENCE:**



### MAKING QUICKBOOKS™ YOUR TOOL, NOT YOUR FRUSTRATION

**Alicia Beard**

*Consultant, Accountant/Bookkeeper, The Financial Department*

QuickBooks™ now offers a web-based platform, and your frustrations with features, shortcuts and various program differences may be growing. With the help of this guided tour, you can make QuickBooks™ work for you.

- The key differences between QuickBooks™ programs and how to determine which version is right for you
- Efficient shortcuts for critical tasks
- Preparation questions to ask before shifting from desktop to online

**SESSION:**

Friday, April 19

**LOCATION:**

Creve Coeur

**AUDIENCE:**



## THE NEW TAX LAW AND YOU: WHAT BUSINESS OWNERS SHOULD KNOW

**Jacob Potter**

*Director of Tax Services*

Swink Smith Coplen & Company P.C.

**David Smith**

*Director of Assurance Services*

Swink Smith Coplen & Company P.C.

The new tax law is in effect and will change tax planning for everyone, especially business owners.

- Gain knowledge to make advantageous changes in your business
- Understand the effects of the new tax law on your business
- Learn about the impact on your estate plan as a result of legislation

**SESSIONS:**

Thursday, May 16  
Creve Coeur

Wednesday, May 22  
Jefferson College

**AUDIENCE:**



“ I am amazed that my bank invests in my business success by offering these classes and providing these resources! ”

## WHAT IS EQ AND WHY SHOULD I CARE?

**Roberta A. Moore, CPA, MBA, MST, EdS, LMFT**  
*Leadership Coaching Specialist, Moore Relationships*

Understand the definition of emotional intelligence and how it contributes to your professional success.

- Explore the 16 fundamental emotional skills vital for workplace success
- Learn how to use both emotions and logic in stressful situations for better performance
- Discover how taking emotion to work with you can enhance your professional life

**SESSION:**  
Friday, April 5

**LOCATION:**  
Creve Coeur

**AUDIENCE:**



## WITH THE RIGHT PEOPLE IN THE RIGHT SEATS – MAGIC HAPPENS!

**Rick Cottrell, CDPFA, CPBA, CPHDA,**  
*Professional EOS Implementer/CEO, BizResults.com*

Less than 20% of companies experience the significant benefits of having the “Right People in the Right Seats.”

- Understand the significant negative impact when you don’t have the Right People in the Right Seats
- Learn a few simple, practical tools to determine if your organization has the Right People in the Right Seats
- Walk away with “Extreme Clarity” regarding the importance of having the Right People in the Right Seats and how to get there

**SESSION:**  
Tuesday, March 26

**LOCATION:**  
Creve Coeur

**AUDIENCE:**



## THE MOST IMPORTANT ASSET NOT ON YOUR BALANCE SHEET: THE ENGAGED EMPLOYEE

**Katie Magoon**

*Owner, People Solutions Center*

**Steve Finkelstein**

*Senior Partner, Experience on Demand*

Imagine what your business results could be if you engaged and developed your highest-valued asset: your team.

- Explore and assess the nine stages of an employee life cycle
- Develop an action plan based on key metrics and industry benchmarks
- Arm yourself with tools to solicit and utilize continuous feedback throughout the life cycle

**SESSION:**

Tuesday, April 16

**LOCATION:**

Creve Coeur

**AUDIENCE:**



## TOP 10 COSTLY HR MISTAKES TO AVOID

**Chris Hesse**

*Vice President, Hesse Martone*

Arm yourself with actionable information and resources to avoid liability scenarios and employment lawsuits.

- Identify employment pitfalls that can create liability
- Provide the knowledge needed to handle difficult employment issues confidently
- Receive a toolkit to document employee issues properly

**SESSIONS:**

Friday, April 26

Creve Coeur

Friday, May 17

Jefferson College

**AUDIENCE:**



## I GAVE THEM FEEDBACK AND THEY STILL HAVEN'T CHANGED

**Dr. Zach Schaefer**

*CEO, Spark the Discussion*

Three types of feedback you can give as a leader that will lead to positive performance results.

- Learn to identify and change your “mental mindset”
- Discover the three types of feedback and when to use each one
- Receive a “Feedback Toolkit” with easy-to-use conversational tactics to make feedback an ongoing process

**SESSION:**

Wednesday, May 15

**LOCATION:**

Creve Coeur

**AUDIENCE:**



“ Taking these classes has helped me learn more details about the Human Resources field that I wasn’t able to learn on the job. ”

## THE A.R.T. OF LEADING BY EXAMPLE: HOW TO BE AUTHENTIC, RELATABLE AND TRANSPARENT

**Coach Shaquan**

*Certified Relationship Coach, Energy Leadership Expert, Transformational Speaker, PRT Coaching Services*

Learn the art of leading by example and become the type of leader you would want to follow.

- Develop strategies for professional and personal development
- Increase opportunities for relationship building by removing barriers
- Implement energy concepts to increase personal productivity and effective communication skills

**SESSION:**

Thursday, April 18

**LOCATION:**

Creve Coeur

**AUDIENCE:**



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## HAS YOUR BUSINESS TURNED INTO A HOUSE OF CARDS?

**Matt Barbey**

*Strategist, Author, Speaker, CEO, Time for Success, LLC*

Reinforce your business foundation to position your company for growth.

- Construct a plan by design rather than default
- Design an experience for your clients and employees supporting your vision
- Determine your measurement and control thresholds

**SESSION:**

Thursday, March 28

**LOCATION:**

Creve Coeur

**AUDIENCE:**



## SALES MANAGEMENT FOR NON-SALES EXECUTIVES

**Jim Messina**

*Partner, LIBRIX A Training & Development Agency*

Unlock the “black box” of the sales world so you can hire and manage sales professionals with confidence.

- Take a deep dive into the world of selling, breaking it into objective, observable pieces
- Learn ways to determine sales associates and managers who are the best cultural fit for your company
- Implement best practices for motivational compensation structures and incentive programs

**SESSION:**

Tuesday, May 7

**LOCATION:**

Creve Coeur

**AUDIENCE:**



“ I’m learning how to expand our company’s culture and ultimately expand our business with these courses. I feel motivated. ”

## Management & Leadership

### IS FRANCHISING RIGHT FOR YOU?

**Ben Terrill**

*Franchise Specialist, FranNet of St. Louis*

**Chris Coleman**

*Franchise Specialist/Owner, FranNet of St. Louis*

Franchising can be an awesome business opportunity – if you know what you’re doing.

- Gain an understanding of what makes franchising a good option for business ownership
- Learn about the various types and models of franchise businesses – including semi-absentee options
- Learn how to effectively find and evaluate opportunities

**SESSION:**

Friday, April 12

**LOCATION:**

Creve Coeur

**AUDIENCE:**



### CONFLICT AND CHANGE: STILL NECESSARY, NO LONGER EVIL

**Katie Lane**

*VP, Delivery/Senior Trainer, Dale Carnegie*

Change and conflict are unavoidable – it’s how you handle them that determines your success.

- Learn a change model to drive growth and minimize conflict
- Build stronger relationships with your team to resolve conflict
- Manage yourself and others during organizational change

**SESSION:**

Wednesday, April 10

**LOCATION:**

Creve Coeur

**AUDIENCE:**



## SPEAK LIKE A PRO TO DELIVER YOUR MESSAGE EFFECTIVELY

**Scott Parres**

*CEO, Parres Training and Development, LLC*

Strengthen your skills to ensure you deliver your message effectively.

- Deliver great presentations using a five-step process
- Manage questions in a presentation
- Apply fundamental presentation skills for your next opportunity

**SESSION:**

Friday, March 29

**LOCATION:**

Creve Coeur

**AUDIENCE:**



## COMPETITIVE INTELLIGENCE: HARNESSING CI FOR MAXIMUM VALUE IN YOUR COMPANY

**Craig Palubiak**

*President, Optim Consulting Group*

**Tom M. Horlacher**

*Managing Principal, Wolverine Business Advisors, LLC*

Competitive intelligence helps you obtain actionable information about products, customers and competitors for making critical decisions in your business.

- Learn techniques for defining, analyzing and distributing actionable information about your competitors
- Understand signals and industry threats to identify disruptive innovation opportunities
- Create a win/loss interviewing process and develop a competitive battlecard

**SESSION:**

Thursday, April 11

**LOCATION:**

Creve Coeur

**AUDIENCE:**



## Marketing

### YOU DON'T OWN CONTROL OF YOUR BRAND – YOUR CONSUMER DOES

**Alan Epstein**

*President, The Epstein Group*

Why understanding the consumer mindset is key to your company's future growth.

- Determine if your brand needs an overhaul or a refresh
- Create a powerful “brand essence” and learn its importance for your business
- Develop a message strategy and communication tools that drive results

**SESSION:**

Tuesday, April 2

**LOCATION:**

Creve Coeur

**AUDIENCE:**



### HOW TO STAND OUT IN TODAY'S DIGITAL LANDSCAPE

**Jolene Sherman**

*Managing Director, Amplified Digital Agency, LLC*

As a business owner, what can you do to break through? Explore the latest in digital marketing and trends affecting small- to medium-sized businesses.

- Understand your audience
- Discover how to make an impact through content marketing
- Learn how to keep your audience engaged throughout their journey in new and unique ways

**SESSION:**

Thursday, May 9

**LOCATION:**

Creve Coeur

**AUDIENCE:**



## THE BRAND CALLED “YOU”

**Michelle Brady**

*Owner & CEO, MMB Music*

Building your personal brand is more than crafting how others view you at work and in the marketplace.

- Understand the components of your personal brand
- Learn how to authentically present and communicate your brand as a leader and through social media
- Develop a personal branding strategy to support your personal and professional goals

**SESSION:**

Tuesday, April 30

**LOCATION:**

Creve Coeur

**AUDIENCE:**



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## CONTENT MARKETING: WIN BY EDUCATING AND ENTERTAINING YOUR TARGET MARKET

**Karen Loiterstein**

*Senior Vice President of Marketing, Enterprise Bank & Trust*

Learn how making your buyer smarter helps you grow your business.

- Define how content marketing achieves marketing and business goals
- Explore the most common - and effective - content marketing tactics
- Provide tools and examples that help you build a content marketing strategy and calendar

**SESSION:**

Wednesday, May 1

**LOCATION:**

Jefferson College

**AUDIENCE:**



To register online, visit [enterprisebank.com/eu](https://enterprisebank.com/eu).



ENTERPRISE UNIVERSITY