

Generationology - Empowering Banks Through Leadership and Professional Development

Virtual & In-Person Leadership and Professional Development Workshops for Banks



Developing People Behind Stronger Banks

Banking continues to change. Technology and AI are reshaping how customers interact with financial institutions. Routine transactions increasingly happen digitally. Experienced employees are retiring while new generations are entering the workforce. Managers are being asked to lead through change, develop talent, retain institutional knowledge, strengthen accountability, and keep teams connected across branches, functions, and generations.

And as more transactions move to technology, the quality of the human interaction matters even more.

At Generationology LLC, we help banks strengthen the people capabilities behind strong performance: leadership, communication, collaboration, trust, feedback, mentoring, knowledge transfer, and the ability to build meaningful relationships with both colleagues and customers.

Our experience in banking and financial services is not superficial.

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For five years, Generationology served as a leadership-development partner to the Office of the Comptroller of the Currency (OCC), delivering workshops for professionals completing OCC Bank Examiner Training. We worked with the professionals responsible for examining and supervising the institutions that make up the federal banking system.

Our sessions focused on capabilities that matter inside today's financial institutions: leading and working across generations, Intergenerational Collaborative Intelligence™, listening, communication, collaboration, and developing the interpersonal effectiveness required to work successfully across roles, experience levels, and perspectives.

That work gave us a distinctive vantage point. We understand the banking environment. We understand the regulatory environment surrounding it. And we understand that technical and financial expertise alone does not make someone an effective leader, colleague, coach, communicator, or relationship-builder.

Our experience extends across the broader financial regulatory community. Generationology has designed and delivered leadership and professional-development programs for major financial regulators, including the Securities and Exchange Commission (SEC). Our work with the SEC has included leadership-development sessions for the Division of Corporation Finance, further expanding our experience working with professionals responsible for some of the nation's most important financial markets and institutions.

Generationology founder Jeffrey Vargas also brings significant executive experience from within the financial regulatory community, having served for seven years as Chief Learning Officer of the U.S. Commodity Futures Trading Commission (CFTC). At the CFTC, he led enterprise learning, technical and regulatory training, leadership development, executive coaching, mentoring, and workforce capability-building.

That combination of experience matters. We understand highly regulated financial environments, but we don't bring regulatory training into your bank. We bring an understanding of the environment in which your people operate and focus on developing the human capabilities they need to succeed within it.

Whether we are working with executives, emerging leaders, managers, branch teams, or customer-facing professionals, our workshops are highly interactive, practical, and grounded in situations participants recognize. We help people communicate more effectively, lead across generations, strengthen trust and accountability, develop others, collaborate across functions, and move beyond simply completing transactions to building stronger customer relationships.

Because ultimately, banking is still a relationship business.

Customers may open an account on their phone, deposit a check without entering a branch, or use technology to handle a routine question. But when the decision becomes important, the situation becomes complicated, or trust is on the line, people still matter.

Our job is to help your people be ready for those moments.

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Below is a list of our workshops. If you have questions, want a write up of a specific workshop, or would like to book a session, feel free to call or text us at 303-569-6143:

<i>Intended Audience</i>	<i>Name of Course</i>
All Employees	Working Across Generations in Banking: Communicating, Collaborating, and Learning from Experience
All Employees	Leading Through Change: Keeping Teams Focused, Connected, and Ready
Executives and Leaders	Winning Workforce Support and Buy-In During Times of Change or Transition
All Employees	Unleashing Collaborative Excellence in a Remote or Hybrid Workplace
Executives and Leaders	"Unlocking the Power of We" – Building and Sustaining High Performing Teams
Executives and Leaders	"Championing Support: Strategies for Empowering Others in the Workplace"
All Employees	How to Give, Receive, Solicit, and Experience Precision Feedback as a Line Employee or Leader
All Employees	Fostering Civility and Camaraderie: Building a Respectful and Connected Workplace
All Employees	"The Currency of Trust" – How to Value, Build, Invest and Spend It
All Employees	Self-Regulation and Self-Care for Leaders and Employees
Executives and Leaders	Practicing the Art of Intergenerational Engagement and Managing Intergenerational Change in Banking
All Employees	How to Practice and Promote Team Psychological Safety in Banking
All Employees	"Permission to Reset" - How to Overcome Self Criticism, Doubt, and Fear
All Employees	"A Letter to my Younger Self" – How to Lead through Introspection and Self Reflection.
All Employees	Executive Presence: Enhancing Presentation and Briefing Skills for Bank Leaders
All Employees	"Thriving Together" - Connecting and Collaborating in a Remote Workplace
New Leaders	Leadership Skills for the Younger Boss – How to Motivate and Sheppard Near Peers, Experienced Workers, and the Next Generation of Leaders
All Employees	"Starting things Off Right" – Understanding and Practicing Onboarding Fundamentals for Bankers

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All Employees	“Reposition that Mirror” – How to Envision and Reflect the Habits, Behaviors, and Systems of a Rising Leader
All Employees	"Mentoring That Works" - Improving the Individual and Organizational Mentoring Experience in Banks
Executives and Leaders	Experiencing Transition Excellence – How to Move from Individual Contributor to Leader
All Employees	How to Validate, Establish, Practice, and Experience New and Emerging Remote, Hybrid, and In-Person Workplace Norms
All Employees	Improving Workplace Relations and Communications
All Employees	How to Prepare for Career Advancement and Greater Job Satisfaction through Self Discipline and Habit Formation
Executives and Leaders	Leading and Managing Across Generations
Executives and Leaders	How to Practice the Art of a Tender and Effective Workplace Apology
All Employees	Enhancing Your Collaborative Intelligence – How to Work with People Who Don’t Think Like You
All Employees	Working Across Generations
All Employees	Workplace Communication Foundations - Building Trust and Collaboration
Executives and Leaders	How to Become a Trusted Intergenerational Leader
All Employees	"Getting to Know Me" - How to Complete and Enhance Your Skills Inventory
Executives and Leaders	“The Humble Leader” - How Humble Leaders Lead, Grow, and Connect with Employees
All Employees	“Unleashing the Leader Within” – How to Unlock and Unleash Your Leadership Capacity
Executives and Leaders	Communication Foundations for Current and Emerging Leaders
New Leaders	“Building Leadership Excellence” for New Leaders
Executives	Enhancing Executive Leadership in Banks
All Employees	"Unleashing the Power of Intergenerational Communication” - What You Say Shapes Connections

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<i>Intended Audience</i>	<i>Name of Course</i>
All Employees	Own Your Career: Creating Individual Development Plans and Career Paths in Banking
All Employees	How to Increase Your Confidence – Personally and Professionally
Executives and Leaders	Coaching Employees through the Creation and Development of Actionable Individual Development Plans
New Leaders	“Winning at Work” – Leadership Cheat Codes for the Gifted and Talented
All Employees	Setting and Achieving Personal and Professional Goals
Executives & Leaders	Turning Engagement Survey Results into Action
All Employees	How to Become a Next-Level Listener and Communicator in Banking
All Employees	How to Build and Advance a Social Media Presence and Keep Your Job
New Leaders	Equipping the New Leader in the Financial Services Industry
Executives and Leaders	How to Create and Care for a Workforce of Purpose on Purpose
All Employees	How to Improve the Sharing of Ideas, Respect, and Trust Between Leaders and Employees and the Performance Management Experience
All Employees	“The Present of Presence” – How to Increase Your Effectiveness in a Virtual Environment through Improved Presence and Presentations
All Employees	"Strengthening Connections" - Fostering Team Cohesion in Virtual and Hybrid Workplace
All Employees	Flourishing in Today's Hybrid and Blended Workplace
Executives and Leaders	Strategic Communications for Leaders and Leadership Teams
All Employees	“The Power of Pivot” – How to Identify, Own, and Execute Pivots of Work and Life
All Employees	How to Experience the Dance of Opportunity and Effective Leadership in Banks
All Employees	Beyond the Transaction: Turning Everyday Customer Conversations into Stronger Banking Relationships
All Employees	How to Improve Morale, Engagement, Performance Management, and Productivity Post a Rapid Change or Significant Change
Executives and Leaders	The Art of Building a Multigenerational Leadership Culture

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<i>Intended Audience</i>	<i>Name of Course</i>
All Employees	Leading Through Compliance Without Losing Culture
All Employees	From Transactions to Relationships: Building a Customer-Centered Banking Culture
All Employees	“Do Something” – How to Set Personal and Professional Goals that will Advance Your Career in Banking
Executives and Leaders	Crisis-Ready Leadership – Navigating the Unexpected with Confidence
All Employees	Mentoring Across Generations and Experience Levels: Developing Talent and Transferring Knowledge
All Employees	Developing Your Leadership Energy – How to Identify, Build, and Unleash Your Leadership Energy and Become the Most Positive, Present, and Engaged Person in the Room

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Why Banks Trust Generationology

We understand the compliance-driven, customer-centric mission of banking institutions and the critical role leadership plays in shaping culture, advancing service quality, and retaining talent. Our training equips bank professionals with the tools to collaborate more effectively, build trust, and lead with clarity and purpose.

Experience With OCC and Other Financial Regulators

We have worked extensively with OCC and SEC, delivering leadership and professional development programs that are practical, high-impact, and built around real challenges in the financial regulatory space. We draw from this experience to help banks, and their teams grow and succeed.

Interactive, Engaging, and Actionable Training

Our workshops go beyond lectures. We create immersive learning experiences using relevant examples, fostering peer discussions, and having individuals do in-class exercises that make concepts stick. Participants leave with insights they can immediately apply to improve performance.

Flexible Training Options for Banks

We offer both virtual and in-person solutions to meet the needs of banks of all sizes. Whether your team is centralized, dispersed across regions, or hybrid, we deliver impactful, inclusive training.

Proven Impact Within Financial Services

Generationology is proud to have earned the trust of over eighty organizations, ranging from billion-dollar corporations to mid-sized and small businesses, impacting tens of thousands of employees across the nation. Our workshops consistently receive outstanding ratings, with participants highlighting their transformative impact and practical value. These accolades reflect our unwavering commitment to delivering exceptional learning experiences that inspire growth, enhance performance, and drive measurable, lasting results for our clients.

Client-Centered Approach

Every bank has its own culture, challenges, and vision. That is why we take a collaborative approach—working with you to identify your team's unique needs and align the right workshops to support your goals.

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Next Step - Contact Us:

We would love to learn more about your team and how we can help. Our team is ready to work with you to select the right workshops and create a plan for impact.

Phone or Text: 303-569-6143

Email: Jeff@generationology.org



CALL or TEXT:

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COMPLETE INTEREST FORM:

[Interest Form](#)