

Generationology - Strengthening Credit Unions Through Leadership, Collaboration, and Member-Focused Growth

Virtual & In-Person Leadership and Professional Development Workshops for Credit Unions



At Generationology LLC, we believe credit unions succeed when their people succeed.

From frontline member service representatives and branch managers to executive leadership teams and boards, we help credit unions strengthen communication, deepen collaboration, improve workplace culture, and build leadership capacity across every level of the organization.

Our virtual and in-person workshops are specifically designed for the unique realities of the credit union movement—where trust, service, community connection, and member relationships matter deeply. We understand that today's credit unions are navigating rapid technological change, increasing member expectations, workforce transitions, succession planning concerns, and growing pressure to attract, retain, and develop exceptional talent.

Our experience working directly with the National Credit Union Administration (NCUA), including its senior leadership team, the Division of Training and Development, and more than 1,200 employees, gives us a unique understanding of the credit union ecosystem and the leadership challenges facing the industry today. In addition to our work with NCUA, we have partnered with major financial regulators including the Office of the Comptroller of the Currency (OCC) and the Securities and Exchange Commission (SEC), helping leaders strengthen communication, collaboration, trust, and workforce effectiveness in highly regulated financial environments.

That experience allows us to bring a practical, real-world perspective to credit union leadership development—one that balances operational excellence with people-centered leadership.

Our workshops are highly interactive, participant-centered, and built to create immediate workplace impact. Every session is designed to strengthen communication, improve member-focused collaboration, enhance intergenerational teamwork, and help credit union professionals lead with greater confidence, clarity, and purpose.

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Below is a list of our workshops – if you have questions, want a write up of a workshop, or want to make an immediate booking, feel free to call or text us at 303-569-6143:

<i>Intended Audience</i>	<i>Name of Course</i>
All Employees	Across Generations in Credit Unions – Learning to Lead, Listen, and Work Better Together
All Employees	Navigating Change: Thriving Through Leadership and Workplace Transition in Credit Unions
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
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
All Employees	How to Practice and Promote Team Psychological Safety in the Workplace
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	Enhancing Online and In-Person Presentation and Briefing Skills
All Employees	"Thriving Together" - Connecting and Collaborating in a Remote Workplace
New Leaders	Leadership Skills for Emerging Credit Union Leaders – How to Lead Near Peers, Experienced Employees, and the Next Generation of Talent
All Employees	“Starting Things Off Right” – Strengthening Onboarding and Early Employee Engagement in Credit Unions

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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
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	Strengthening Communication and Collaboration Across Credit Union Teams
All Employees	Preparing for Career Growth and Leadership Opportunities Through Discipline, Consistency, and Professional Habits
Executives and Leaders	Leading and Managing Across Generations
Executives and Leaders	Restoring Trust Through Accountability and Effective Workplace Apologies
All Employees	Enhancing Your Collaborative Intelligence – How to Work with People Who Don't Think Like You
All Employees	Working Across Generations
All Employees	Communication Foundations for Credit Union Teams – Building Trust, Collaboration, and Stronger Member Service
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 Emerging Credit Union Leaders
Executives	Enhancing Executive Leadership

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<i>Intended Audience</i>	<i>Name of Course</i>
All Employees	"Unleashing the Power of Intergenerational Communication" - What You Say Shapes Connections
All Employees	Owning Your Career Journey – Building Effective Development Plans and Leadership Pathways in Credit Unions
All Employees	Building Workplace Confidence and Professional Presence
Executives and Leaders	Coaching Employees through the Creation and Development of Actionable Individual Development Plans
New Leaders	"Winning at Work" – Winning at Work – Practical Leadership Insights for High-Potential Employees
All Employees	Setting and Achieving Personal and Professional Goals
Executives & Leaders	How to Improve Your Workplace Engagement Survey Scores
All Employees	Becoming a Stronger Listener and Communicator in Member-Focused Environments
All Employees	Social Media, Professionalism, and Protecting Your Professional Reputation
New Leaders	Equipping Emerging Leaders for Long-Term Success
Executives and Leaders	Building a Purpose-Driven Credit Union Culture
All Employees	Strengthening Trust, Communication, and Performance Conversations Across Credit Union Teams
All Employees	"The Power of Presence" – Strengthening Your Effectiveness in Virtual Environments Through Presence and Presentation Skills
All Employees	Strengthening Connections in Hybrid Credit Union Teams
All Employees	Flourishing in the New Virtual 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
All Employees	Delivering Exceptional Member Service Experiences
All Employees	Rebuilding Engagement, Trust, and Team Effectiveness During Times of Change

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<i>Intended Audience</i>	<i>Name of Course</i>
Executives and Leaders	The Art of Inclusive Multigenerational Leadership
All Employees	Do Something That Moves You – Setting Goals That Support Career Growth and Leadership Development
All Employees	Strengthening Mentorship Across Generations, Roles, and Teams
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 Credit Unions Trust Generationology

We Understand the Mission of Credit Unions

Credit unions are different.

They are member-owned, relationship-driven organizations with a mission centered on the financial well-being of the people and communities they serve. That mission requires more than financial expertise. It requires leaders who communicate clearly, employees who trust one another, teams that work effectively across functions and generations, and a workplace culture that supports exceptional member service.

At Generationology, we help credit unions develop stronger leaders, strengthen communication, and trust, and build teams that work well together in service to their members.

Our workshops give leaders and employees practical approaches for navigating generational differences, improving collaboration, strengthening workplace relationships, developing leadership capability, and creating the kind of employee experience that supports an exceptional member experience.

Experience that Connects Directly to the Credit Union Community

Before Jeffrey Vargas began his career in the federal government, he began his professional career in the credit union community.

His first job out of college was with State Department Federal Credit Union (SDFCU) in Alexandria, Virginia, where he would spend seven years as a Training Officer. That experience gave Jeffrey a firsthand understanding of credit union culture, the learning and development needs of credit union employees and leaders, and the direct connection between developing people and delivering on the credit union mission.

He learned the credit union business from the insideworking with the people responsible for serving members every day and seeing how leadership, communication, employee development, trust, and service come together to shape the member experience.

That firsthand credit union experience is complemented by Generationology's extensive work with the National Credit Union Administration (NCUA), including its senior leadership team, Division of Training and Development, and employees across the agency.

Our experience also extends across the broader financial regulatory community, including work with the Office of the Comptroller of the Currency (OCC) and the Securities and Exchange Commission (SEC).

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Few leadership-development firms bring this combination of experience: seven years working inside a credit union, extensive work with the federal agency responsible for regulating and supervising federal credit unions, and decades of leadership and workforce-development experience across complex financial and regulatory organizations.

We understand credit unions from the inside. We understand the regulatory environment around them. And we understand how developing people connects directly to the mission of serving members.

Interactive and Practical Learning Experiences

Our workshops are highly interactive and grounded in situations credit union professionals recognize.

Participants engage in facilitated discussion, realistic workplace scenarios, collaborative exercises, reflection, and conversations that connect leadership, communication, trust, generational dynamics, feedback, and teamwork to their own workplace.

We respect the experience people bring into the room and create opportunities for them to learn from one another while developing new approaches they can put into practice.

The goal is application. Participants leave with practical approaches they can use with their teams, colleagues, and members—not simply information they heard in a workshop.

Participants leave with practical insight, stronger self-awareness, and a clearer understanding of how the concepts discussed apply within their own teams, branches, departments, and leadership environments.

Flexible Delivery for Credit Union Teams

Generationology offers virtual and in-person learning for leadership retreats, employee development initiatives, conferences, strategic planning sessions, emerging-leader programs, and broader leadership-development efforts.

Whether an organization has one location, multiple branches, regional operations, remote employees, or hybrid teams, we work with each credit union to determine the format and learning experience that makes sense for its workforce, culture, and goals.

Regardless of format, our focus remains the same: deliver learning that is engaging, relevant, respectful of employees' time, and useful when they return to work.

Strengthening Workplace Culture and Member Experience

Workplace culture directly influences the member experience.

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When employees communicate effectively, trust one another, feel supported by leadership, and understand how their work contributes to the broader mission of the organization, members experience the difference in meaningful and lasting ways.

Credit unions are relationship-driven organizations. Internal communication, collaboration, leadership consistency, and employee engagement all shape the level of trust members place in the institution and the experience they have when interacting with it.

Our workshops are designed to help credit unions strengthen the internal dynamics that contribute to healthier workplace cultures, stronger leadership practices, and more connected teams. From communication and collaboration to leadership development and succession planning, our goal is to support organizations in building environments where employees feel connected to both the mission and the people they serve.

Client-Centered Partnership

At Generationology, we do not believe in one-size-fits-all training.

Every credit union has its own culture, workforce dynamics, leadership challenges, and member priorities. That is why we collaborate with our clients to understand their goals and tailor workshop experiences that align with their people, mission, and organizational direction.

Whether supporting frontline staff, developing emerging leaders, or strengthening executive communication and culture, our goal is simple:

To help credit unions build stronger leaders, healthier teams, and more connected workplaces that ultimately serve members better.

Ready to Strengthen Your Credit Union?

Tell us about your people, your priorities, and what you want to strengthen. We will help you identify the workshops and learning experiences that make sense for your organization.

Phone or Text: 303-569-6143
Email: Jeff@generationology.org

