SUNDAY, OCTOBER 1

Join us in our efforts this year to raise money for CU4Kids, Children’s Miracle Network Hospitals. We will be selling raffle tickets throughout our event for a chance to win some great prizes. Tickets will be 5 for $20. Be one of the first to get your ticket when you check in at the conference registration desk on Sunday, October 1st. Your donations for this fundraising effort will be presented to the local Children’s Miracle Network hospital on Wednesday, October 4th. Raffle tickets will be sold at the Welcome Center through 3:15 p.m. on Tuesday with the drawing taking place at 4:15 p.m. in the General Session Room.

7:30 a.m. – 12:30 p.m.
PRE-CONFERENCE WORKSHOP
Frank Lloyd Wright
Ballroom
Salon CD

Pre-Conference Workshop
(includes Continental Breakfast)
THE IDEATION CENTER at DBSI (off site)
Bus departs at 8:15 a.m.
Seeing is Believing: An Immersive Strategy Workshop for Transforming the Branch to Captivate your Members Attention

Ready to turn branch transformation how? into wow!? Celent research shows 81% of banking executives consider branch channel optimization an imperative, yet only 1 in 10 have a clear vision of what a solid strategy looks like.

Stop trying to simply “read” about innovative ideas when you can come “experience” what the branch of the future means for your financial institution at the Ideation Center AKA The Banker’s Playground. A place that has inspired thousands of banking executives to cut through the clutter and bring their visions to life, you’ll spend your day learning and interacting with designs, sensory experiences, and technologies that align with where the branch is headed, along with research-based advice, trends and insight into how your peers are doing in their efforts.

8:30 a.m. – 7:30 p.m.
CONFERENCE REGISTRATION
Frank Lloyd Wright
Ballroom

Conference Registration
Refreshments during Registration
Sponsored by Rivial Data Security

1:00 – 3:00 p.m.
COO EXCHANGE
Grand Canyon
Sponsored by CURateReset and CUNA Strategic Services

The COO Exchange is an opportunity to discuss ideas, best practices and knowledge with other credit union professionals. This session will provide a forum to network in a smaller group setting. Registration will be limited to the first 45 attendees.
1:00 – 3:00 p.m.  
**TECHNOLOGY EXCHANGE**  
*Mesa*  
*Sponsored by Mortgage Cadence, an Accenture Company*  
The Technology Exchange is an opportunity to discuss ideas, best practices and knowledge with other credit union professionals. This session will provide a forum to network in a smaller group setting. Registration will be limited to the first 45 attendees.

3:15 – 4:00 p.m.  
**FIRST-TIME ATTENDEE ORIENTATION**  
*Frank Lloyd Wright Ballroom*  
*Salon CD*  
If you’ve never attended this conference before, plan on joining us at the first-time orientation. We’ll provide a quick rundown of conference events and leave plenty of time for you to start networking with other attendees.

4:15 – 4:30 p.m.  
**WELCOME AND OPENING REMARKS**  
*McArthur Ballroom*  

4:30 – 4:45 p.m.  
**CHILDREN’S MIRACLE NETWORK INTRODUCTION**  
*McArthur Ballroom*  
We will be having a fundraising effort throughout the conference and a check will be presented to the local Children’s Miracle Network hospital on Wednesday morning. Meet some of the local kids. You will also have a chance to win some great prizes by buying raffle tickets.

4:45 – 5:45 p.m.  
**KEYNOTE ADDRESS**  
*McArthur Ballroom*  
*CROSSING THE GENERATIONAL DIVIDE: UNLOCKING THE POWER OF GENERATIONS TO GROW YOUR BUSINESS*  
*Sponsored by CUNA Mutual AdvantEdge Analytics, LLC*  
*Jason Dorsey, Chief Strategy Officer, The Center for Generational Kinetics, Austin, TX*  
We work in a time of unprecedented generational challenge and change. Four generations in the workforce. Five generations in the marketplace. And making matters worse, there is a tremendous amount of misinformation around generational differences. What we know for a fact: Strategies that work for one generation can be a complete turn-off for others. This generational divide makes your job more difficult and more important than ever. In this provocative presentation, bestselling author Jason Dorsey exposes new generational truths that directly impact leaders like you. Jason shares surprising data, firsthand stories, and step-by-step actions. You can rely on these actions to drive communication, engagement, recruiting, and more. Arrive early because you want to hear why Gen Y doesn’t like vowels and the one tool Baby Boomers never leave home without. You’ll also instantly discover why Jason Dorsey has earned 1,000 standing ovations and been featured on 60 Minutes, 20/20, and The Today Show.
WELCOME RECEPTION – Meet your Sponsors
Co-Sponsored by Axis Communications Inc. and Passageways

Join us for the opening welcome reception directly following our keynote speaker, Jason Dorsey. This is a great time to meet up with old friends and make some new ones. Our 90+ sponsors will also be on hand showcasing their latest products. There will be plenty of food and beverage available.

MONDAY, OCTOBER 2

7:00 a.m. – 4:45 p.m.
Frank Lloyd Wright Ballroom

WELCOME CENTER
Conference Registration
Sponsor Area
Internet Café – Sponsored by Finastra and Q2
Charging Stations – Sponsored by Finastra and FIS

7:00 – 8:00 a.m.
Frank Lloyd Wright Ballroom

BREAKFAST – Visit with Sponsors
Co-Sponsored by DELL and Palitto Consulting Services, Inc.

8:00 – 9:30 a.m.
McArthur Ballroom

SPEED ROUNDS – Session 1
They’re back and more popular than ever! Join us for 11 fast paced presentations from top technology companies.

9:30 – 9:45 a.m.
Pass Time to Breakout Sessions

9:45 – 10:45 a.m.
Flagstaff

BREAKOUT SESSIONS
The Use and Promise of Blockchain (session repeats)
Sponsored by Vidyo, Inc. and CUNA Strategic Services
John Best, CEO, Best Innovation Group, Denver, CO
Dean Young, SVP Industry Engagement, PSCU, St. Petersburg, FL

This session will give attendees insight into Blockchain technology and its potential for credit unions. Learn about how Blockchain can help credit unions solve operational and logistical challenges, improve record keeping, support remittance and settlement functions, and automate contracts. While the technology is still in the early phases, Blockchain could eventually alter how assets of many kinds are transferred. Now is the time for the credit union industry to take note.
The current market environment has applied pressure on the credit union industry to mitigate costs and identify new sources of revenue in an environment with an ever-shrinking tolerance for risk and experimentation. Leveraging visual analytics to enhance performance dashboards will empower business users to grow market share, enhance revenue, and reduce expenses. Dashboards are an increasingly vital aspect to a credit union’s data analytics journey as CIOs and COOs work to uncover hidden insights to improve business outcomes.

The “Dashboards to Die For” session will focus on discussing the traits and components of highly effective dashboards, lessons learned and common missteps, and key considerations to launching and operationalizing your data visualization suite.

Are you a member of FSISAC? What about InfraGard? ISACA? How does your credit union stay up to date on current threats, both nationally and locally, and turn that information into actionable intelligence?

As leaders, we expect our managers to coach their staff to produce greater results, provide better service and achieve higher levels toward whatever goals we set for their team. Our managers agree that they need to coach their staff to achieve their goals. So why aren’t they all jumping at the chance to coach? Why aren’t we seeing the strong coaching culture we expect? There are a wide variety of reasons managers don’t or won’t coach their staff. It boils down to three main issues that we’ll investigate – and discover solutions for! – during this session.
Grand Canyon

**CU Awareness Initiative** (session repeats)

*Sponsored by BankOn Mobile Video by Financial Town*

Michelle Hunter, SVP, Credit Union of Southern California, Anaheim, CA
Steve Langley, SVP/CRO, Schools Financial CU, Sacramento, CA

During this session, you’ll be presented up-to-the-second consumer research on what consumers know – and don’t know – about credit unions, the latest trends in consumer preferences for financial services, and how a group of credit union leaders is working to leverage this information to create top-of-mind consumer awareness of the credit union category in financial services. For the past few months, the Creating Awareness Advisory Group, a cross-section of credit union leaders and marketers from across the industry, has embarked on an effort to define the credit union category at the highest level in order to clarify the industry in the minds of consumers.

Frank Lloyd Wright Ballroom

**How is the Branch Environment Still Relevant in the Digital Age?**

*(session does not repeat)*

*Sponsored by Next Caller, Inc.*

Anthony Burnett, Customer Experience Director, LEVEL5, Atlanta, GA
Linda Fedrick, VP Member Relations, ABECU, St. Louis, MO
Kim Potokar, Senior National Manager, Branch Sales & Service, Alliant CU, Chicago, IL

As the digital age continues to strive, so do the many theories on what a suitable branch environment should be. Please join our panelist and hear of different branch perspectives—physical branch intensive, digital intensive, and a combination of both. This information, along with an industry perspective, sets the stage for an engaging session.

10:45 – 11:15 a.m.
Frank Lloyd Wright Ballroom

**NETWORKING BREAK – Visit with Sponsors**

*Sponsored by Agility Recovery and CUNA Strategic Services*

11:15 – 11:30 a.m.

11:30 a.m. – 12:30 p.m.
Flagstaff

**BREAKOUT SESSIONS**

**The Use and Promise of Blockchain**

*Sponsored by Smart Source, Critical Communications, LLC*

John Best, CEO, Best Innovation Group, Denver, CO
Dean Young, SVP Industry Engagement, PSCU, St. Petersburg, FL

This session will give attendees insight into Blockchain technology and its potential for credit unions. Learn about how Blockchain can help credit unions solve operational and logistical challenges, improve record keeping, support remittance and settlement functions, and automate contracts. While the technology is still in the early phases, Blockchain could eventually alter how assets of many kinds are transferred. Now is the time for the credit union industry to take note.
Mesa

**Technology Scales, People Don’t** (session does not repeat)
*Sponsored by Access Softek, Inc.*
Chris Caile, Sr. Principal Solutions Marketing Manager, Nuance Communications, Inc., Burlington, MA

In a few short years financial institutions will need to manage thousands, even millions of conversations a day. It won’t be feasible to keep hiring contact center agents to deal with this increasing volume of customer engagements. To complicate matters, customers expect “always on” service even though it isn’t practical to have a 24 hour, 7 day a week contact center. In this session come hear how you can use 21st century tools, including AI, Virtual Assistants & Robust messaging with strong authentication to improve your customer interactions without dramatically increasing your service team.

Casa Grande

**How to Determine your CU’s Desired Cybersecurity Maturity Target** (session does not repeat)
*Sponsored by Easy Solutions, Inc.*
Jerry Beasley, CISM, Security Services Manager, TraceSecurity, Baton Rouge, LA
Michael Raibick, Senior Cybersecurity Consultant, Crowe Horwath, Dallas, TX

Once you’ve established where your CU sits using the FFIEC Cybersecurity Assessment Tool, how do you organize and execute the next step? How do you organize the work, the meetings, manage opinions and establish your organization's target Cybersecurity Maturity level for each domain so you can develop the plan to get there.

Frank Lloyd Wright Ballroom

**Three Reasons Your Managers Don’t Coach – And What to Do About It!**
*Sponsored by LEVEL*
Tim Hagen, Founder, Progress Coaching, Cedarberg, WI

As leaders, we expect our managers to coach their staff to produce greater results, provide better service and achieve higher levels toward whatever goals we set for their team. Our managers agree that they need to coach their staff to achieve their goals. So why aren’t they all jumping at the chance to coach? Why aren’t we seeing the strong coaching culture we expect? There are a wide variety of reasons managers don’t or won’t coach their staff. It boils down to three main issues that we’ll investigate – and discover solutions for! – during this session.
**CU Awareness Initiative**  
_Sponsored by CU Engage_  
Michelle Hunter, SVP, Credit Union of Southern California, Anaheim, CA  
Steve Langley, SVP/CRO, Schools Financial CU, Sacramento, CA  
During this session, you’ll be presented up-to-the-second consumer research on what consumers know – and don’t know – about credit unions, the latest trends in consumer preferences for financial services, and how a group of credit union leaders is working to leverage this information to create top-of-mind consumer awareness of the credit union category in financial services. For the past few months, the Creating Awareness Advisory Group, a cross-section of credit union leaders and marketers from across the industry, has embarked on an effort to define the credit union category at the highest level in order to clarify the industry in the minds of consumers.

**The Future of Performance Evaluations**  
_(session does not repeat)_  
_Sponsored by BankSight_  
Spencer Park, Deseret First CU, Salt Lake City, UT  
The session will review what you need to know about switching from annual performance evaluations to shorter monthly employee reviews. The speaker will review what he has learned as DFCU has made this transition.

**MEMBERSHIP LUNCH** (Open to all Technology attendees and Technology sponsors)  
_Sponsored by Blend_  
Join us for the CUNA Technology Council Membership Lunch. Your chair, Guy Russo, will provide an update of the CTC activities throughout the past year.

**NETWORKING LUNCH** (Open to all Operations & Member Experience attendees and Operations & Member Experience sponsors)  
Join your fellow O&ME Council peers and sponsors for a great networking opportunity. Help yourself to a great buffet and join a table for some lively conversation.

**Pass Time to Session**

**SPEED ROUNDS – Breakout Session 2**  
Join us for the 2nd round of 11 fast paced presentations from top technology companies.

**NETWORKING BREAK – Visit with Sponsors**  
_Sponsored by Redhawk Network Security, LLC_
3:45 – 4:00 p.m.  Pass Time to Session

4:00 – 4:45 p.m.  AWARDS PRESENTATION  
McArthur Ballroom  
Sponsored by Support EXP  
Join us as we present the Operations & Member Experience Council and Technology Council awards.

6:00 – 8:00 p.m.  SOCIAL EVENT - Casino Night = FUN!  
Arizona Biltmore Ballroom  
Thank you to our contributing sponsors Allied Solutions, LogRhythm, SMA Solutions™ and Symitar  
Join us for our ever-popular Casino Night! We will have all your favorite games along with lots of food and beverages. Plus, stay until the end and have a chance to win some fantastic prizes! There will be ample opportunities to network with your conference sponsors and attendees. Adult guests may join you at this event. There is a charge of $75 for each guest.

TUESDAY, OCTOBER 3

7:00 a.m – 3:15 p.m.  WELCOME CENTER  
Frank Lloyd Wright Ballroom  
Conference Registration  
Sponsor Area  
Internet Café – Sponsored by Finastra and Q2  
Charging Stations – Sponsored by Finastra and FIS

7:00 – 8:00 a.m.  BREAKFAST – Visit with Sponsors  
Frank Lloyd Wright Ballroom  
Sponsored by Evolve IP

8:00 – 8:15 a.m.  CONFERENCE ANNOUNCEMENTS  
McArthur Ballroom

8:15 – 9:15 a.m.  GENERAL SESSION  
Charting the Future of Financial Services Technology  
Sponsored by Keeper Security  
Mark Sievewright, Founder & CEO, Sievewright & Associates, Medfield, MA  
A transformation is underway in the U.S. financial services industry that will have a profound impact on how participants do business, how they strategize about their futures and how they collaborate around products, service and information.
During this session, Mark will highlight how the financial services business model is changing; how new entrants are disrupting the industry through innovation; how technology is changing the nature of financial services delivery and distribution; and, how demographic shifts require financial firms to adapt their cultures and value propositions to gain market share.

9:15 – 9:30 a.m.  
Pass Time to Breakout Sessions

9:30 – 10:30 a.m.  
**BREAKOUT SESSIONS**

**Flagstaff**

*What’s a Successful CIO Look Like Today and Into the Future? A Panel Discussion* (session repeats)  
*Sponsored by Quanitivate*

Brian Kidwell, EVP, D. Hilton Associates, The Woodlands, TX  
Bobby Michael, President/CEO, Army Aviation Center FCU, Daleville, AL  
Moderator: Charlotte Morrison, CIO, Texans CU, Richardson, TX

What are credit union CEO’s looking for today? How has the role changed? And what changes are on the horizon? A panel discussion with a CEO who has recently completed a CIO search and industry recruiters who performed the search.

**Mesa**

*Building a Culture of Innovation Using Design Thinking* (session repeats)  
*Sponsored by Temenos*

Sean Loosli, Sr. Product Manager, Innovation Programs, Digital Insight, an NCR Company, Redwood City, CA  
Rob Mills, CTO, Rivermark Community CU, Beaverton, OR

Innovation is a hot topic these days, but how do you keep it from becoming just another buzzword? In this session, we will discuss concrete tactics, methods, and mindsets that can help you foster innovation within your organization. You will learn about Design Thinking, and see how the core principles of empathy, ideation, and experimentation can help you get better results than conventional methods. We will also explore different options for organizing to innovate, building upon best practices from both Financial Services and other industries.

**Casa Grande**

*Real Change with Real-Time Payments* (session does not repeat)  
*Sponsored by LSC® and CUNA Strategic Services*

A.J. Acitelli, Director, Product Management, NCR, Duluth, GA  
Brian Colyer, Payments Product Manager, NCR, Duluth, GA

Payments are moving faster than ever before. Real-time payment schemes are influencing how ACH is used to settle transactions and The Clearing House’s real-time payments initiative will introduce a new mechanism to move money, which has the potential to dramatically impact the payments and money movements landscape.
Effective and Successful Teams (session repeats)
Sponsored by Newtek Business Services Corp. and CUNA
Strategic Services
Scott Voland, CEO, The Voland Group, Lubbock, TX
Chris Wheatley, Connections Project Administrator, Numerica CU, Spokane Valley, WA

There are teams, and then there are Dream Teams. Leaders who crack the code enjoy higher levels of engagement and productivity. In this interactive session, you’ll explore the various dimensions of successful teamwork: How Dream Teams are different; The cultural components of high-performing teams; The leadership skills required to manage a team of top performers.

Sales Culture vs Service Culture – What Drives Better Results?
(session repeats)
Sponsored by Strategic Resource Management, Inc.
Melissa Hanes, Learning and Development Director, Blue FCU, Cheyenne, WY
Rod Snyder, AVP Sales & Branch Development, Red Canoe CU, Longview, WA

Credit union cultures thrive for different reasons. Some cultures lead with sales while others lead with service. Whether through coaching, training, or support from the top, this session will outline the elements that drive both successful sales and successful service cultures at two high-functioning credit unions.

Advancements in Analytics (session repeats)
Sponsored by Newgen Software Inc.
Jen Underwood, Founder, Impact Analytix, LLC, Tampa, FL

In this session, we will explore the advancements happening in analytics. We discuss key transformational trends, explore “blue ocean” opportunities in a new world of data, and inspire you to try something new. Topics include but are not limited to Automation, Predictive and Prescriptive Analytics, Artificial Intelligence, Internet of Things, Real-Time, Big Data, Cloud and Immersive Experiences. Don’t miss the demos in this thought-provoking session to apply the latest innovations!

10:30 – 11:00 a.m.  NETWORKING BREAK – Visit with Sponsors
Sponsored by Kronos

11:00 – 11:15 a.m.  Pass Time to Breakout Sessions
11:15 a.m. – 12:15 p.m. **BREAKOUT SESSIONS**

**Flagstaff**

**What's a Successful CIO Look Like Today and Into the Future? A Panel Discussion**

*Sponsored by Great Bay Software, Inc.*

Brian Kidwell, EVP, D. Hilton Associates, The Woodlands, TX
Bobby Michael, President/CEO, Army Aviation Center FCU, Daleville, AL
Moderator: Charlotte Morrison, CIO, Texans CU, Richardson, TX

What are credit union CEO’s looking for today? How has the role changed? And what changes are on the horizon? A panel discussion with a CEO who has recently completed a CIO search and industry recruiters who performed the search.

**Mesa**

**Building a Culture of Innovation Using Design Thinking**

*Sponsored by 3SI Security Systems and CUNA Strategic Services*

Sean Loosli, Sr. Product Manager, Innovation Programs, Digital Insight, an NCR Company, Redwood City, CA
Rob Mills, CTO, Rivermark Community CU, Beaverton, OR

Innovation is a hot topic these days, but how do you keep it from becoming just another buzzword? In this session, we will discuss concrete tactics, methods, and mindsets that can help you foster innovation within your organization. You will learn about Design Thinking, and see how the core principles of empathy, ideation, and experimentation can help you get better results than conventional methods. We will also explore different options for organizing to innovate, building upon best practices from both Financial Services and other industries.

**Casa Grande**

**Securing the Technology for Work at Home**

*(session does not repeat)*

*Sponsored by Adapt Telephony Services, LLC*

Dennis Tabor, Sr. Director IT Operations, Open Tech Solutions, Centennial, CO
Michelle Wilson, Director Information Security, Open Tech Solutions, Centennial, CO

Thinking of shifting to a Work At Home model for call center and other areas of your business? This breakout will give you some guidance on things to think about is terms of process, people, technology, and security. Areas for consideration when designing the right solution for the type of worker, including security considerations to ensure the security of your member data is maintained.
There are teams, and then there are Dream Teams. Leaders who crack the code enjoy higher levels of engagement and productivity. In this interactive session, you’ll explore the various dimensions of successful teamwork: How Dream Teams are different; The cultural components of high-performing teams; The leadership skills required to manage a team of top performers.

Credit union cultures thrive for different reasons. Some cultures lead with sales while others lead with service. Whether through coaching, training, or support from the top, this session will outline the elements that drive both successful sales and successful service cultures at two high-functioning credit unions.

In this session, we will explore the advancements happening in analytics. We discuss key transformational trends, explore “blue ocean” opportunities in a new world of data, and inspire you to try something new. Topics include but are not limited to Automation, Predictive and Prescriptive Analytics, Artificial Intelligence, Internet of Things, Real-Time, Big Data, Cloud and Immersive Experiences. Don’t miss the demos in this thought-provoking session to apply the latest innovations!

As the saying goes – ‘Birds of a feather flock together.’ Join us for this unique opportunity to have a discussion with your peers along shared interest topics. It’s easy – just help yourself to a great buffet and pick a table topic that interests you and join the discussion. Feel free to move around to several tables if you’d like.
12:15 – 1:15 p.m.  **MEMBERSHIP LUNCH** (Open to all Operations & Member Experience attendees and Operations & Member Experience sponsors)  
*Sponsored by PSCU*

Join us for the CUNA Operation & Member Experience Membership Lunch. Your chair, Greg Inman, will provide an update of the O&ME activities throughout the past year.

1:15 – 1:30 p.m.  **Pass Time to Breakout Sessions**

1:30 – 2:30 p.m.  **BREAKOUT SESSIONS**

*Mesa*  
**Transformation Navigation** (session repeats)  
*Sponsored by OnBase by Hyland*  
Lisa Huertas, Chief eXperience Officer, Texas Tech FCU, Lubbock, TX

In an era of new widgets and technology forward options, many institutions are struggling to select technology vehicles that support the vision, strategy and culture of their organization. In this session, we will talk about how to translate your vision and strategic goals into an executable plan with technology vehicles to help you get there.

*Grand Canyon*  
**The Gentle Art of Password Management** (session repeats)  
*Sponsored by CliftonLarsonAllen, LLP*  
David Trepp, President/CEO, Info@Risk, Inc., Eugene, OR

Just behind exploiting social engineering vulnerabilities, defeating or stealing weak credentials is one of the easiest ways to break into an information system. From password rules and change policies, to application and Windows password storage techniques, vulnerabilities around credentials abound. Including examples from actual credential exploits, David will outline credential management issues, challenges, best practices, and future tools for identification and authentication.

*Casa Grande*  
**Real Time Analytics to Enhance the Member Experience**  
(session does not repeat)  
*Sponsored by Jwaala*  
Paul Ablack, CEO, OnApproach, Plymouth, MN

Top tier e-retail companies are using more real-time analytics, because of the pressure to meet the ever expanding needs for on-demand information, anytime and anywhere. Although data and analytics leaders intuitively understand the value of fast analytical insights, many are unsure how to achieve them. In this session, we will define real-time analytics and look at why it is a big opportunity for credit unions to create deep relationships with their members.
Frank Lloyd Wright
Ballroom
Salon AB

**Practical Tools for Process Improvement** (session repeats)
* Sponsored by EnableSoft, Inc.  
Ryan Brogan, Sr. Consultant, Cornerstone Advisors, Scottsdale, AZ  
Ryan Myers, Director, Cornerstone Advisors, Scottsdale, AZ

Process improvement is not just a methodology – it’s a mentality. Cornerstone Advisors will share pragmatic tips to identify opportunities, design enhancements, and GET STUFF DONE! Rather than buzzwords and theory, this session will focus on practical methods, rules, and tools that create habits and instill a process improvement mentality in your credit union.

Flagstaff

**The Value of Journey Mapping** (session does not repeat)
* Sponsored by Zipwhip  
Norman Buchanan, 1st VP Member Experience, Alliant CU, Chicago, IL  
Stephanie Como, Division Project Manager, SchoolsFirst FCU, Tustin, CA  
Kathy Cumberworth, VP Corporate Sales Manager, Seven Seventeen CU, Warren, OH  
Kelly Hofheins, VP Member Experience, Mountain America CU, West Jordan, UT

Member Journey Mapping is an engaging, collaborative process used to map out a particular experience from the member’s point of view, identifying pain points, and design new processes with the goal of creating seamless member experience at every “touch point” of the journey. Learn from a panel about the role member journey mapping has at their credit union and the value it has brought to both the organization and membership.

Frank Lloyd Wright
Ballroom
Salon CD

**How (and Where) to Have Relevant Conversations with the Right Consumers for You** (session repeats)
* Sponsored by Noble Systems  
Chris Warwick, VP Consumer Marketing & Program Design, Kasasa, Austin, TX

With 17% of consumers switching banks, and majority of them being Millennials, how can community banks entice them to their institution? In this session, Kasasa will share important insights into how consumers make purchase decisions and which products they want to buy. Learn how to engage with them and develop a marketing strategy that cuts through the clutter, deliver results and stretch dollars further.

In this session, the following will be discussed: Ways that integrated marketing can increase your ROI; The right and wrong ways to implement marketing automation; Strategies that community financial institutions should use to improve their targeting.
2:30 – 3:00 p.m. Networking Break – Sponsor Drawings
Frank Lloyd Wright Ballroom

3:00 – 3:15 p.m. Pass Time to Breakout Sessions

3:15 – 4:15 p.m. Breakout Sessions

Mesa

Transformation Navigation
Sponsored by Millennial Vision, Inc.
Lisa Huertas, Lisa Huertas, Chief eXperience Officer, Texas Tech FCU, Lubbock, TX Monrovia, CA

In an era of new widgets and technology forward options, many institutions are struggling to select technology vehicles that support the vision, strategy and culture of their organization. In this session, we will talk about how to translate your vision and strategic goals into an executable plan with technology vehicles to help you get there.

Grand Canyon

The Gentle Art of Password Management
David Trepp, President & CEO, Info@Risk, Inc., Eugene, OR

Just behind exploiting social engineering vulnerabilities, defeating or stealing weak credentials is one of the easiest ways to break into an information system. From password rules and change policies, to application and Windows password storage techniques, vulnerabilities around credentials abound. Including examples from actual credential exploits, David will outline credential management issues, challenges, best practices, and future tools for identification and authentication.

Casa Grande

Putting the Right Product in Front of the Right Member at the Right Time (session does not repeat)
Sponsored by InfoIMAGE, Inc.
Todd Hutchinson, Director Solution Delivery, WEtap Media, Portland, OR

How a personalization platform and member data, delivers a financially valuable experience to members. By messaging members and providing them with a clear low friction course of action, when there is a product that will save or make them money. Making sure even your members who never use your public website, and only use online banking see these relevant offers.
Frank Lloyd Wright Ballroom

**Practical Tools for Process Improvement**
*Sponsored by Ascensus*
Ryan Brogan, Sr. Consultant, Cornerstone Advisors, Scottsdale, AZ
Ryan Myers, Director, Cornerstone Advisors, Scottsdale, AZ

Process improvement is not just a methodology – it’s a mentality. Cornerstone Advisors will share pragmatic tips to identify opportunities, design enhancements, and GET STUFF DONE! Rather than buzzwords and theory, this session will focus on practical methods, rules, and tools that create habits and instill a process improvement mentality in your credit union.

Flagstaff

**How Real Time Engagement Drives Credit Unions’ Success**
*(session does not repeat)*
*Sponsored by ClickSWITCH*
Melanie Gillen, Director Capability Leader, CUNA Mutual Group, Madison, WI

Disengaged employees cost your credit union money. Nearly 70% of US employees report that they are not engaged or are actively disengaged at work. With disengagement costing US employers $550 billion per year, having engaged employees is imperative for your credit union’s success. Join us as we explore how real time engagement tools and the use of game mechanics are being used across the globe to motivate employees with metrics that matter while boosting morale and driving results. You’ll learn how leaders use engagement tools for frequent and proactive recognition, training and coaching discussions. We’ll also share lessons learned from four large credit unions on how they improved their feedback, focus, and fun with game mechanics and generated non-interest income along the way.

Frank Lloyd Wright Salon CD

**How (and Where) to Have Relevant Conversations with the Right Consumers for You**
*Sponsored by Gunnebo Cash Management Solutions*
Chris Warwick, VP Consumer Marketing & Program Design, Kasasa, Austin, TX

With 17% of consumers switching banks, and majority of them being Millennials, how can community banks entice them to their institution? In this session, Kasasa will share important insights into how consumers make purchase decisions and which products they want to buy. Learn how to engage with them and develop a marketing strategy that cuts through the clutter, deliver results and stretch dollars further.

In this session, the following will be discussed: Ways that integrated marketing can increase your ROI; The right and wrong ways to implement marketing automation; Strategies that community financial institutions should use to improve their targeting.
4:15 p.m.  Raffle Ticket Drawing  
McArthur Ballroom  

Evening  ON YOUR OWN

WEDNESDAY, OCTOBER 4

8:00 – 8:30 a.m.  BREAKFAST  
McArthur Ballroom

8:30 – 8:45 a.m.  Presentation to Children’s Miracle Network – CU4Kids  
McArthur Ballroom

8:45 – 9:45 a.m.  GENERAL SESSION  
How to Drive Results from Your Data Analytics  
Sponsored by London Security Solutions  
John Best, CEO, Best Innovation Group, Denver, CO  

Data Analytics, everyone agrees that you need it? But what do you do with it once you have it? Join John as he discusses 3 specific examples of using data from data analytics to improve your credit unions performance.

9:45 – 10:00 a.m.  BREAK

10:00 – 11:00 a.m.  CLOSING SESSION  
The Psychology of Illusion – Perspective  
Sponsored by Nuance  
Vinh Giang, Entrepreneur, Keynote Speaker, Magician  

Vinh presents the audience with a magic performance and invites them to offer their solutions as to how it was done. In going through this process, the audience learns quickly that perspective is the key to solving any problem. After all, magic is just a problem that your attendees do not have the solution to. While they may appear complicated, magic tricks are problems specifically designed with no solution. By getting a small insight into how to solve magic tricks, imagine the clarity your attendees will take into the other problems in their business and personal lives. “All it takes is a different vantage point to navigate through the most complex of mazes.” Vinh Giang

11:00 – 11:15 a.m.  CLOSING REMARKS