SATURDAY, SEPTEMBER 30

1:00 – 5:00 p.m. SECURITY SUMMIT (separate fee required)
Join us for the 4th Annual Security Summit. To view the full agenda, click on Security Summit above.

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.

8:00 a.m. – 3:00 p.m. SECURITY SUMMIT - continued

8:30 a.m. – 7:30 p.m. CONFERENCE REGISTRATION

1:00 – 3:00 p.m. TECHNOLOGY EXCHANGE
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
If you’ve never attended this conference before, plan on joining us at the 1st 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

4:30 – 4:45 p.m. CHILDREN’S MIRACLE NETWORK INTRODUCTION
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
Crossing the Generational Divide: Unlocking the Power of Generations to Grow Your Business
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.

5:45 - 7:30 p.m.  WELCOME RECEPTION – Meet your Sponsors
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.  WELCOME CENTER
Conference Registration
Sponsor Area
Internet Café
Charging Stations

7:00 - 8:00 a.m.  BREAKFAST – Visit with Sponsors

8:00 - 9:30 a.m.  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.  BREAKOUT SESSIONS
The Use and Promise of Blockchain (session repeats)
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.

Dashboards to Die For (session does not repeats)
Jim Kearney, Point B, Inc. Seattle, WA
Tory Tolton, Principal, Point B, Inc., Seattle, WA
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.

Understanding Financial Industry Security Resources (session does not repeat)
Gene Fredrickson, PSCU, Petersburg, FL
Charlotte Morrison, CIO, Texans CU, Richardson, TX
Bill Podborny, CISO, Alliant CU, Chicago, IL
Moderator: Mike Atkins, CIO, Bellco CU, Centennial, CO
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?

10:45 – 11:15 a.m. NETWORKING BREAK – Visit with Sponsors

11:15 – 11:30 a.m. Pass Time to Breakout Sessions

11:30 a.m. – 12:30 p.m. BREAKOUT SESSIONS

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Technology Scales, People Don’t (session does not repeat)
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.

How to Determine your CU’s Desired Cybersecurity Maturity Target (session does not repeat)
Jerry Beasley, CISM, Security Services Manager, TraceSecurity, Baton Rouge, LA
Michael Raibick, 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 organizations target Cybersecurity Maturity level for each domain so you can develop the plan to get there.

12:30 – 1:30 p.m. MEMBERSHIP LUNCH (Open to all Technology attendees and Technology sponsors)
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.

1:30 – 1:45 p.m.  Pass Time to Session

1:45 – 3:15 p.m.  SPEED ROUNDS – Session 2

Join us for the 2nd round of 11 fast paced presentations from top technology companies.

3:15 – 3:45 p.m.  NETWORKING BREAK – Visit with Sponsors

3:45 – 4:00 pm  Pass Time to Session

4:00 – 4:45 p.m.  AWARDS PRESENTATION

Join us as we present all of the Operations & Member Experience and Technology Council awards.

6:00 – 8:00 p.m.  SOCIAL EVENT

Casino Night = FUN!

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

Conference Registration
Sponsor Area
Internet Café
Charging Stations

7:00 - 8:00 a.m.  BREAKFAST – Visit with Sponsors

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

8:15 – 9:15 a.m.  GENERAL SESSION

Charting the Future of Financial Services Technology
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 though 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
What’s a Successful CIO Looks Like Today and Into the Future? – A Panel Discussion (session repeats)
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.

Building a Culture of Innovation Using Design Thinking (session repeats)
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.

Real Change with Real-Time Payments (session does not repeat)
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.

10:30 – 11:00 a.m.  NETWORKING BREAK – Visit with Sponsors
11:00 – 11:15 a.m.  Pass Time to Breakout Sessions
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Securing the Technology for Work at Home (session does not repeat)
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.

12:15 – 1:15 p.m. BIRDS of a FEATHER (NETWORKING LUNCH) (Open to all Technology attendees and Technology sponsors)
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.

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

1:30 – 2:30 p.m. BREAKOUT SESSIONS
Transformation Navigation (session repeats)
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.

The Gentle Art of Password Management (session repeats)
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.

Real Time Analytics to Enhance the Member Experience (session does not repeat)
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.

2:30 – 3:00 p.m. NETWORKING BREAK – Sponsor Drawings

3:00 – 3:15 p.m. Pass Time to Breakout Sessions
3:15 - 4:15 p.m. BREAKOUT SESSIONS

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Putting the Right Product in Front of the Right Member at the Right Time (session does not repeat)
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.

4:15 p.m. Raffle Ticket Drawing

Evening ON YOUR OWN

WEDNESDAY, OCTOBER 4

8:00 – 8:30 a.m. BREAKFAST

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

8:45 – 9:45 a.m. GENERAL SESSION
How to Drive Results from Your Data Analytics
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
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