# CUNA Operations & Member Experience Council and CUNA Technology Council Virtual Conference Option

**Tuesday, September 29 – Thursday, October 1, 2020**

*Thank you to our Signature Sponsor*

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<tr>
<th>Date</th>
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| TUE 9/29/2020 | 2:00 – 3:30 PM CT | Welcome  
Virtual Exchange  
*Join John Best, industry favorite technology expert from Best Innovation Group, and a variety of your technology and operations peers for this fast-paced, interactive session. Bring your creative ideas, or challenges that keep you up at night, to discuss with others who understand your strategic role in making your credit union successful. Don’t miss it!* |
| TUE 9/29/2020 | 3:30 – 3:45 PM CT | Break – Visit the Solutions Marketplace  
*Sponsored by IMS, Inc.*  
*Check out the amazing sponsors in the Solutions Marketplace.* |
| TUE 9/29/2020 | 3:45 – 4:45 PM CT | Networking Event  
*Sponsored by Trellance*  
*An opportunity to talk with others, share insights, make connections, gain ideas, and much more!* |
| WED 9/30/2020 | 10:00 – 11:00 AM CT | Opening General Session: How Human Centric Brands Win in a Tech Dominated World  
*Sponsored by ORIGENCE, a CU Direct Brand*  
*Stefan Olander, Former Vice President, Global Digital Innovation for Nike; #7 in Fast Company’s 100 Most Creative People in Business*  
*Creativity, imagination, purpose, passion, and courage are indispensable tenants of the brand success that Stefan Olander brought to Nike’s digital platforms. By combining this deep brand understanding and carefully managing the human/technology equation, he articulates how* |

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All times listed in central time (CT)

*Updated: 9/22/2020*

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organizations—from healthcare and manufacturing to retail and transportation—can bridge the gap between the physical and digital to deliver meaningful solutions that create value for both consumers and business. In a style that is fast-paced, provocative, and highly motivating, Olander will arm you with actionable ideas to help define your organization’s digital future.

WED 9/30/2020
11:00 – 11:15 AM CT

Break – Visit the Solutions Marketplace
Sponsored by InfoIMAGE, Inc.
Check out the amazing sponsors in the Solutions Marketplace.

WED 9/30/2020
11:15 – 12:00 PM CT

Concurrent Breakout Sessions (6)

WED 9/30/2020
11:15 AM – 12:00 PM CT
O – Breakout 1

The Ever-Evolving Risk Landscape & Industry Hot Topics - Compliance In 2020
Sponsored by 3SI Security Systems and CUNA Strategic Services
Jared Ihrig, Chief Compliance Officer & Counsel, CUNA
In today’s regulatory environment, there are so many rules and laws to keep up with. And that’s before even considering the impacts of a pandemic affecting your credit union! It feels almost impossible for credit union compliance officers, management & boards to stay on top - let alone ahead of the examiners and auditors, especially as the regulatory landscape continues to evolve almost on a daily basis. Jared Ihrig, CUNA’s Chief Compliance Officer & Counsel, will discuss the top regulatory areas of focus and compliance trends for 2020, and provide details regarding supervisory expectations as well as tips and tools that credit unions can use to manage the regulatory burden. Come listen and learn how to stay afloat in the world of regulations, while still providing excellent service to your credit union’s members.

WED 9/30/2020
11:15 AM – 12:00 PM CT
O – Breakout 2

Member Experience: Passionate Employees who ENGAGE Members
Sponsored by POPi/o Mobile Video Cloud and CUNA Strategic Services
Amy Beaumont, VP Consumer Loans & Member Services, Black Hills FCU, Rapid City, SD
Renae Hicks, Learning & Performance Manager, Black Hills FCU, Rapid City, SD
We all want to create the best member experience possible. Creating this experience starts with employees who are passionate about the Credit Union movement, and these passionate employees who then ENGAGE their members throughout the member’s Credit Union journey. Join us to see how one Credit Union has successfully improved their member experience.

WED 9/30/2020
11:15 AM – 12:00 PM CT
O – Breakout 3

It’s Not All Bad: Why and How to Adopt Long-Term Remote Leadership Strategies
Elisa Matthews, Facilitator, Client Performance Strategies, Allied Solutions LLC
Julie ann Wessinger, National Direction, Client Performance Strategies, Allied Solutions, LLC
Applicable strategies for continuing to engage staff and provide strong leadership in a remote environment. Key topics addressed:

- Remote engagement channels to leverage (and best practices for each channel – phone & video, specifically)
- Soft skills to adopt (i.e. consideration of employees’ individual behavior styles)
- Virtual training and development best practices

WED 9/30/2020
11:15 AM – 12:00 PM CT
T – Breakout 1

Recruiting and Managing a Productive Remote Team
Sponsored by RingCentral
Arleen Scavone, Principal, Newbold Advisors
Remote work culture should not be something left to collect dust in a mission statement. The best company cultures provide a framework that gives employees a sense of comfort and confidence to confront obstacles and grow from challenges.
Telework isn’t going anywhere as the Coronavirus continues to surge around the world, but that doesn’t mean every business is ready to thrive in the remote work environment. Both managers and
employees can find themselves struggling to assimilate, but embracing these challenges is the first step in overcoming them.

By adopting a trial-and-error approach to remote team management, businesses can start to unify themselves under common struggles and find ways to achieve their goals despite any learning curves workers may face. Best practices will be shared to help you source a remote team and strengthen their productivity in either an interim or remote work environment.

**WED 9/30/2020**
11:15 AM – 12:00 PM CT
T – Breakout 2

**An Overview of the NCUA Information Systems and Assurance Examination Program (ISAEP)**
Sponsored by CoNetrix - Tandem
Johnny Davis, Special Advisor to the Chairman for Cybersecurity and Critical Infrastructure Division Director, National Credit Union Administration (NCUA)
This presentation provides an update on the NCUA Information Systems and Assurance Examination Program (ISAEP) to include the evolution of the Automated Cybersecurity Examination/Evaluation Toolbox (ACET) self-assessment solution and the Information Technology Risk Examination for Credit Unions (InTREx-CU) solution within the NCUA Modern Examination and Risk Identification Tool (MERIT). Cybersecurity hygiene and IT Service Management (ITSM) resilience continues to be the root cause towards Information Security Program effectiveness. The NCUA’s ISAEP focuses on examining the credit unions Information Security Programs success in implementing and maintaining, at a minimum, critical security controls as well as security controls and practices appropriate for the institutions identified risk management strategy.

Session is will not be recorded and will not be available after the conference.

**WED 9/30/2020**
11:15 AM – 12:00 PM CT
T – Breakout 3

**Moving Faster in The Enterprise: Real-World Benefits and Hurdles for Being Agile**
John Weland, Co-Founder & Principal Consultant, Deliveron Consulting Services
Companies need to be able to adapt and Go To Market faster than ever before. The competition in the market has become fierce with new ways to leverage data to make business decisions. Business units are requiring faster outcomes from IT than ever before.

How do you transform your internal organization to move at the speed that your business requires? In this session, we will level-set what Agile means and how it can impact your organization. You will learn about the benefits, and the hurdles to overcome while moving to a more Agile organization.

**WED 9/30/2020**
12:00 – 1:30 PM CT
Break – Visit the Solutions Marketplace
Sponsored by Ondot
Grab a snack and make sure to visit all the speed round participants and all the solutions providers in the Marketplace.

**WED 9/30/2020**
1:30 – 2:15 PM CT
Concurrent Breakout Sessions (6)

**WED 9/30/2020**
1:30 – 2:15 PM CT
O – Breakout 4

**The Future of Banking is Digital –Are We There, Yet?**
Paula Tompkins, CEO and Founder, ChannelNet
Nikhil Lakanpal, Co-Founder, Narmi
We’re talking a Digital Transformation, Growth and Efficiencies – featuring a panel discussion with speakers from ChannelNet and Narmi.

Digital transformation does not mean the death of branch banking. It represents a major shift in our thinking! Learn how you can use digital strategies to drive members to the point of sale and look to your branches for help with more complex, consultative needs and products and services such as Mortgages, financial planning, retirement, and debt consolidation.

We will also discuss what strategies some of the fastest growing FIs and Fin Techs use; how processes have changed over last five years and how automation is key to your credit union’s successful Digital Deposit Growth and improved efficiencies.

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Let’s revolutionize how we run our credit unions; unifying the digital and physical experiences and providing a personalized, intuitive experience regardless of touchpoint.

**Juggling the Member Experience**  
*Sponsored by Access Softek, Inc.*  
Chris Court, VP Accounting & Operations, Service 1st FCU  
Laura Eblen, Director of Growth, Mazuma CU, Overland Park, KS  
Join us as we balance member engagement and consumer behavior with the right mix of operational expense, efficiency, technology needs and deepened relationship building. We will discuss methods for engagement within this new normal using a combination of remote employee work arrangements and utilization of multiple digital channels for consumers including video, web, chat and AI integration.

**Fraud & Scams: The Human Factor**  
*Sponsored by DefenseStorm*  
Ken Otsuka CPA, Senior Consultant, Risk & Compliance Solutions, CUNA Mutual Group  
Fraudsters are crafty, knowing how to pressure your employees and your members to make decisions on the spot by using innovative schemes. Their multi-channel approach looks for victims who find their stories convincing and will willingly share sensitive information, which can be used to authorize and perform many types of transactions. Unfortunately, the fraudulent transaction is often a legit exchange based upon a fairy tale.

**How to Deliver Leading-Edge Technology Solutions on a Shoestring Budget (Panel)**  
*Sponsored by Fonolo*  
Moderator: Willis Chang, Enterprise Systems Architect, Kinecta Federal Credit Union  
Panel: Andrew Bertrand, CIO, Our Community CU, Shelton, WA  
Tom O’Shea, President & CEO, Aspire FCU  
Ever wonder how small and mid-sized credit unions can innovate and compete with the big banks? Learn what practices have enabled their success (besides a good technology leader, of course). As the credit union industry faces COVID-19 related economic headwinds and evolving consumer behavior & expectations, it will be important to maximize our budgets to adapt. Join us to pick up actionable tips to apply at your own credit union!

**RPA Fundamentals**  
Richard Gordon, Digital Transformation & RPA Specialist, FIS Global  
Tom Howell, Solution Consultant – RPA, FIS Global  
This session will discuss approaches to initiating an RPA endeavor: project selection methods, tools, governance, skill set, and pitfalls.

**Member Verification in the Blink of an Eye**  
John Ainsworth, CEO & President, CULedger, LLC  
Disrupt the authentication process by bringing member verification into the 21st century ... no need to ask obscure out-of-wallet questions or require your members to disclose sensitive information. Whether in the branch, online or on the phone, there is an opportunity to reduce fraud and friction.

**Break – Visit the Solutions Marketplace**  
*Continue to visit and make connections.*

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Seismic demographic shifts and the resulting “lower for longer” interest rate environment mean longstanding economic assumptions, relationships and metrics are less relevant. The Fed’s influence has eroded. Politics and the political climate have assumed increasing importance. Member behaviors, interactions and credit union operating results are fundamentally changing. In an environment characterized by crisis, uncertainty and increasing complexity institutional leadership takes center stage in ensuring success. In this session Steve and Mike will explore these themes and their implications for credit unions in 2021 and beyond.

Break – Visit the Solutions Marketplace

Engage in one more conversation with a solution provider in the Marketplace.

Networking Event

Sponsored by Rivial Data Security

Details coming soon!

Thursday, October 1, 2020

Speed Rounds

Sponsored by The Clearing House

Emcee: Caroline Martorano, Director IT Support and Operations, BCU

You can drive innovation in just FIVE minutes! Twelve back-to-back technology demos from forward-thinking companies that will help you drive change in your organization. Watch, learn, vote!

1. **Glia** – *Digital Member Service from Chat to Video Banking* – Social distancing has unwittingly thrust us all into a digital-first world! However, lack of physical member interactions is an opportunity as much as a challenge. Glia will demonstrate a seamless Digital Member Service approach to holistic member servicing in the new reality using CoBrowsing-enabled chat and voice through video banking.

2. **3SI Security Systems** – *SafeResource®* – Imagine a global view of your entire branch network, while staff perform automated operational, safety, health, and procedural checks. Imagine ENS capabilities at individual, branch, regional or systemwide levels. Imagine SafeResource®, an app just for Credit Unions offering two-way communication and reporting, making regulatory compliance, effective auditing, and cost-savings possible.

3. **Illuma Labs** – *Illuma Shield* – Looking to improve the member experience at your contact center? Battling increased call volume and long hold times? Concerned about fraudsters defeating out-of-wallet questions with stolen PII? Illuma Shield Voice Authentication and Fraud Prevention can help you with all three pain points: eliminate friction, improve efficiency, and enhance security.

4. **Zipwhip** – *Zipwhip Texting for Business* – Business texting for credit unions isn’t a novelty anymore, it’s a necessity. In this demo, we will show how Zipwhip’s texting platform enables credit unions to communicate about important COVID-related
information, speed the loan process and fund more loans, and reduce delinquencies and charge-offs.

5. Atando Technologies, LLC – Blending AI with Digital Face-to-Face Experience – Leveraging an Omnichannel platform and AI, Atando helps credit unions engage with their members – more important during this pandemic – in a safe, healthy, digital way through the web, mobile, SMS and more while controlling the cost-to-serve with AI Chatbots.

6. ORIGENCE, a CU Direct Brand – Origence POS – A dynamic application that allows an applicant to apply for a loan and membership in one single end to end experience and is supported with automated services aimed at increasing ease of use, reducing fraud, and providing personalized product opportunities.

7. Access Softek, Inc. – Biometric Authentication Manager™ – Modern Member Authentication: improve security, member experience and call productivity while controlling expenses!

8. Fiserv – Virtual Banking Assistant – Do members need to be experts at math, money and complex data analysis to manage their personal finances? No, but it may seem that way to those who are overwhelmed by finances. Fiserv’s Artificial Intelligence based tool can delivers proactive and actionable insights to help members live more financially healthy lives.

9. Ondot Systems – Card App – Take your cards to the next level with Ondot Card App™, a mobile app that allows cardholders to get, use and manage their cards, as well as understand their spending, right from their phone. Attend this demo and see what card modernization looks like and how easy it is to offer to your members.

10. CoNetrix – Tandem Business Continuity Planning – Tandem’s Business Continuity Planning application is designed specifically for the needs of credit unions. Streamline the maintenance of your program, conduct business impact analysis to make restoration plans effective, use industry specific templates to respond to disasters, and send notifications to your team members to make sure everyone is safe.

11. Fiserv – Bill Discovery – Consumers want financial institutions to provide more advisory-like services to help them manage their bill pay routine. Fiserv offers a new bill pay feature called Bill Discovery that uses automation and intelligence to help create a seamless bill pay experience. Come see how you can help improve members’ payment experience.

12. Avtex Solutions, LLC – Smart Bot – Smart Bot is the latest Avtex SmartApp. It leverages existing SmartApps integrations core systems to provide hyper-personalized, AI-driven bot interactions with members, in a conversational and consistent manner across digital and voice channels. Smart Bot provides seamless escalation to live agents and agent assistance throughout the live member interaction.

THU 10/1/2020
12:30 – 2:00 PM CT

Break – Visit the Solutions Marketplace

Sponsored by Allied Solutions
Take a quick break and make sure to visit all our solution providers in the Marketplace.

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Concurrent Breakout Sessions (6)

**Transforming Disruption into Opportunity**  
*Sponsored by TimeTrade*  
Moderator: Lisa Anderson, IT Systems Manager, Affinity Plus FCU  
Panel:  
Sarah Kuesel, Senior Manager, Affinity Plus FCU  
Teri Laufers, CIO, Affinity Plus FCU  
Gene Pranger, Founder & CEO, POPi/o Mobile Video Cloud  
The panel will discuss the impact of COVID’s swift descent on credit union delivery channels, services, and products and the rapid and continuous decision-making required. We will go over the types of partnerships and enhancements needed in this slipstream to leverage existing delivery channels and creating new ones to enhance the member experience. We will discuss an example of how Affinity Plus FCU evaluated and implemented a video service strategy as part of that adaptation. In transforming disruption into opportunity, we will discuss wins and misses and the lessons learned that we can carry forward.

**Electronic Payments Update**  
Amy Smith, Vice President, Executive Director, The Clearing House Payments Authority  
The financial services industry has been busy looking for ways to move payments faster. This session will provide an update on various payment channels in the faster payments revolution. Also, this session will include an update on ACH rule changes that impact financial institutions in 2020 and 2021, including ACH data security requirements.  
1. Discuss applicable rule changes for ACH and RTP payment rails.  
2. Explore ACH Data Security Requirements.  
3. Explore and discuss the benefits of Faster Payments.

**Riding the Rapids – Leading Through Uncertain Times**  
*Sponsored by SilverSky by BAE Systems and CUNA Strategic Services*  
Lauralee Hites, Senior Organization Consultant, Stratavize Consulting Inc  
Leaders in uncertain times cannot wait for a return to ‘normalcy’. You must be an agent of change and help others successfully navigate through the change. After surviving uncertain times in the mortgage industry; Lauralee studied what skills it takes and what tools are required to help managers successfully ride the rapids of uncertainty. Achieving success in today’s high-consequence, highly uncertain, and rapidly changing world requires that leaders be adept in living and acting out of their comfort zones. Organizations must keep a keen eye for incremental change, but leadership must look for exponential opportunities.

**Strategic Execution for An Enhanced Member Experience**  
Ray Ragan, Co-Founder, Clear Core, LLC  
*Sponsored by Glia*  
90% of organizations will fail to execute their strategy successfully, according to the requisite strategic read “The Balanced Scorecard.” This should give pause to any leader serious about the future of their credit union. If an organization is prepared and takes strategy seriously, why do most fail in successfully executing their strategy? Most organizations fail in executing strategy and it has less to do with the strategy itself, but rather it is a lack a feasible execution plan. In this presentation, learn how to decompose a strategy into actionable plan with accountability.
Uncovering the Mystery Behind Ethical Hacking – How Hacking Can Help You!
Sean Verity, Ethical Hacking Manager, Michigan State University Federal Credit Union
Need help understanding how your organization can benefit from an Ethical Hacker? This session will explore what an Ethical Hacker can do for your organization by improving the security posture of your Credit Union. Topics such as 3rd party Ethical Hacking firms and outlining security practices that can be valuable to a Credit Union of any size is something that is beneficial to everyone as we increasingly encounter more and more bad actors in the Credit Union space. Determining how to select an Ethical Hacking firm and what to watch out for when doing so to ensure you are getting the best value for your purchase can help with reducing future costs associated with recovering from an attack on your organization. Mitigating risk and ensuring the safety of data continues to be an issue worldwide. Join us to learn about some of the tools that you can implement to prevent disaster from occurring.

Learn How to Make the Leap from IT Middle Management to a Seat at the Chief’s Table
Moderator: Charlotte Morrison, SVP/CIO, Amplify Credit Union
Panel:
Samantha Amburgey, Chief Information Officer, Michigan State University FCU
Ben Morales, Chief Technology & Operations Officer, WSECU
Chris Saneda, SR EVP/COO Virginia Credit Union
So, you want to be a CIO? You understand security, server infrastructure, networks, software development and service desk technology. But do you know your credit unions strategic goals? Do you partner with the business units to meet their business needs through technology? Can you translate your complex technical knowledge to business "speak"? This panel of Credit Union Chiefs will discuss their journey from middle management to a seat at the Chiefs table. They will share their perspective and what it takes to get you there.

Closing General Session: Calm Within the Storm: The Role of Leaders in Today’s Chaos
Sponsored by HC3
Wesley D. Williams, VP Information Technology, ValleyStar CU
What is your 2020 “Storm” story? From COVID-19, to closing branches and transitioning to remote work, to the deaths of George Floyd, Breonna Taylor and Ahmaud Arbery leading to civil unrest, and the heightened awareness surrounding diversity, equity and inclusion... We all have a 2020 story to share. This session will help you find the energy and enthusiasm to make an impact, support your employees and press on in spite of the chaos! Join us as we discuss:

- Meditating – Reflect, Listen and Make time for YOU
- Refocusing – Remember your PASSIONS and PURPOSE
- Creating – BE the change you want to see

We must remain “Calm” and LEARN into the challenges of the day and together we will be the change our organizations, our families and the nation need to see. Leave inspired, and ready to take actionable steps that you can use now and in the future.