KEYNOTE SESSIONS

PETER SHEAHAN
Founder and CEO, Karrikins Group

DR. JULIE WILLIAMSON
VP, Strategy + Research, Karrikins Group

OPENING KEYNOTE
Beyond Business as Usual: Rethinking Strategy in a Changing Industry

It doesn’t matter how well you execute the wrong strategy! The more disruption your credit union faces, the more important it is to be rigorous in your planning so you aren’t creating a strategy for a world that no longer exists. Peter and Julie will provide new ways of thinking and provide pertinent examples that you can use to better understand change and disruption in a rapidly evolving financial industry to better connect your strategic planning process and relevance in the market.

11:30 AM – 12:30 PM, EST
10:30 AM – 11:30 AM, CST
9:30 AM – 10:30 AM, MST
8:30 AM – 9:30 AM, PST

► Add to calendar

CLOSING KEYNOTE
Accelerated Growth: Building Organizations through Innovation, Courageous Leadership, and Alignment

As a leader and leadership team, it is crucial to build a culture that enables your organization to exploit new opportunities more effectively and to accelerate your own transformation. Peter and Julie will unpack the five decision drivers (objective, emotional, structural, habitual and social) that can be used to convert opportunity into value by accelerating organizational transformation and drive alignment and execution of strategic plans designed to ensure relevance well into the future.

4:00 PM – 5:00 PM, EST
3:00 PM – 4:00 PM, CST
2:00 PM – 3:00 PM, MST
1:00 PM – 2:00 PM, PST

► Add to calendar
OPENING BREAKOUT SESSIONS

Four sessions happening concurrently

The Economy and Its Impact on Your 2018 Strategic Plan

STEVEN RICK
Chief Economist,
CUNA Mutual Group

As a credit union leader heading into 2018 strategic planning season, you are facing the challenge of assessing corporate strategy in a highly uncertain economic environment. Recent economic trends and the Federal Reserve will have significant implications for your credit union heading into 2018. This session will review the factors that will lead to an increase in short-term and long-term interest rates and their impact on your credit union balance sheets and earnings performance. You’ll leave this session with an understanding of the key trends impacting deposit and loan activity, how future economic events will impact growth patterns into 2018, and standards against which your credit union’s performance can be measured.

1:30 PM – 2:15 PM, EST
12:30 PM – 1:15 PM, CST
11:30 AM – 12:15 PM, MST
10:30 AM – 11:15 AM, PST

Lending to Millennials: Minimizing Risks in a Virtual World

JIM BULLARD
Risk Management Consultant,
CUNA Mutual Group

Millennials have been identified as a powerful source of future lending opportunities. Reaching this generation will require more virtual channels and less face-to-face interaction. Mobile and online communication provides convenience for prospective members, but is not without risk. This session will explore ways to effectively utilize mobile channels to reach members, while maintaining red flag compliance and adequate member authentication.

1:30 PM – 2:15 PM, EST
12:30 PM – 1:15 PM, CST
11:30 AM – 12:15 PM, MST
10:30 AM – 11:15 AM, PST

CUNAMUTUAL.COM/DISCOVERY  2
OPENING BREAKOUT SESSIONS

Four sessions happening concurrently

Investing in Fintech Companies

BRIAN KAAS
Managing Director, CMFG Ventures

Credit union and consumer preferences are changing while technology and competition place new demands on how products are bought and sold. With all the hype around disruption in the market, it can be hard to know how to respond. What do fintech startups mean for credit unions? Should we hold these competitive disruptors at arm’s length, or embrace them as potential partners? CUNA Mutual Group recently established its own venture fund, CMFG Ventures, to help address these questions. This session will address fintech trends, how CMFG Ventures is seeking opportunities for credit unions in this new and innovative space, and how credit unions can become involved.

1:30 PM – 2:15 PM, EST
12:30 PM – 1:15 PM, CST
11:30 AM – 12:15 PM, MST
10:30 AM – 11:15 AM, PST

Real Time Payments: What You Need to Know

SHAZIA MANUS
Chief Product and Strategy Officer, CO-OP Financial Services

In 2015, the Federal Reserve and nearly 500 payment system stakeholders joined forces to improve the U.S. payment system. At this session, we’ll fast forward to 2018, for a preview of how payments could look in the near future. You’ll learn about real time payment systems such as Early Warning System’s Zelle Network, review pros and cons of different approaches, and how payment system improvements could impact your credit union.

1:30 PM – 2:15 PM, EST
12:30 PM – 1:15 PM, CST
11:30 AM – 12:15 PM, MST
10:30 AM – 11:15 AM, PST

Add to calendar
CLOSING BREAKOUT SESSIONS

Four sessions happening concurrently

Transform How You do Business with the Power of Data & Analytics

ANNE LEGG
Director, Market/Client Strategies, CUNA Mutual AdvantEdge Analytics

Analytics has the power to transform how you do business, but can you get there without a comprehensive, multi-year road map? Is a talent gap or lack of experience in play? Is fragmented member data preventing you from realizing the power of predictive analytics?

Learn about key insights, trends and case studies from banks and credit unions that use data and analytics to drive big initiatives: better member service, improved top-line revenue and reduced acquisition costs. Discover where you can reap these benefits and identify the fundamentals you need to start building a data and analytics roadmap—along with the avoidable pitfalls in executing your data strategy. Don’t miss this opportunity to realize more value from your credit union’s data and start planning your data and analytics journey.

3:00 PM – 3:45 PM, EST
2:00 PM – 2:45 PM, CST
1:00 PM – 1:45 PM, MST
12:00 PM – 12:45 PM, PST

Add to calendar

Insights from CUNA’s 2017-18 E-Scan: Plan to Prevail in 2018

JEFF RENDEL
President, Rising Above Enterprises

Strategic planning provides framework and structure to ensure you’re having the right conversations within your credit union. But with all the “shiny objects” out there, it can be tough to stay focused on what’s most important. Explore the top insights and trends for the credit union industry from CUNA’s hot-off-the-press 2017-2018 Environmental Scan. You’ll walk away with actionable insights to spark conversations in your upcoming strategic planning sessions.

3:00 PM – 3:45 PM, EST
2:00 PM – 2:45 PM, CST
1:00 PM – 1:45 PM, MST
12:00 PM – 12:45 PM, PST

Add to calendar
CLOSING BREAKOUT SESSIONS

Four sessions happening concurrently

**Becoming Digital: The Path to Frictionless Financial Services**

MARK SIEVEWRIGHT
Founder & CEO,
Sievewright & Associates

A transformation is underway in the financial services industry that will have a profound impact on how credit unions do business, how they strategize and collaborate around products, services and information. Learn key industry changes and their implications for credit union leaders. Learn about the primary opportunities and challenges and how enhancing the execution of digital and payments strategies will allow your credit union to remain relevant and to prosper.

3:00 PM – 3:45 PM, EST
2:00 PM – 2:45 PM, CST
1:00 PM – 1:45 PM, MST
12:00 PM – 12:45 PM, PST

**Exploring Pathways to Improve Members’ Financial Health**

CHAD HELMINAK
Moderator
CUNA Mutual Group

RACHEL VAN NOORD
Panelist, Director
Community Outreach
BECU (WA)

GLENN BIRCH
Panelist, Director of Public & Media Relations
Virginia Credit Union

ANN McMILLIAN, CCE
Panelist, EVP/COO,
IH Mississippi Valley Credit Union (IL)

It's estimated that more than half of Americans are financially unhealthy and lack the capability to save and plan for their financial future. While credit unions have traditionally offered resources and products to promote thrift, how might our industry work together to evolve our offerings to promote healthy choices aimed at getting our members’ wallets “in shape”? This panel discussion will explore the efforts of three credit unions that are partnering with the National Credit Union Foundation and the Center for Financial Services Innovation to develop new levels of engagement and create positive behavioral change to improve financial health.

3:00 PM – 3:45 PM, EST
2:00 PM – 2:45 PM, CST
1:00 PM – 1:45 PM, MST
12:00 PM – 12:45 PM, PST

► Add to calendar
HOT TOPIC CHATS

Join the conversation! Led by a subject matter expert/facilitator, conference attendees can share experiences and ask questions.

SET 1  Two sessions happening concurrently

**Rightsizing Big Data**

ANNE LEGG  
Director, Market/Client Strategies, CUNA Mutual AdvantEdge Analytics

Learn how to turn data analytics into a competitive asset.

11:00 AM – 11:20 AM, EST  
10:00 AM – 10:20 AM, CST  
9:00 AM – 9:20 AM, MST  
8:00 AM – 8:20 AM, PST

**Risky Business: Known Unknowns**

BECKY GARTON  
Consultant, Risk & Compliance Solutions, CUNA Mutual Group

JEN TORBECK  
Senior Compliance Manager, CUNA Mutual Group

Enhance your decision-making skills during these uncertain times as our risk and compliance consultants share their knowledge and set a clearer path for success.

11:00 AM – 11:20 AM, EST  
10:00 AM – 10:20 AM, CST  
9:00 AM – 9:20 AM, MST  
8:00 AM – 8:20 AM, PST

Add to calendar
HOT TOPIC CHATS

SET 2

Consumer Payments: Technologies & Trends

DORALEE McNEARY
Consultant, Risk & Compliance Solutions
CUNA Mutual Group

Discover new ways to monitor your exposures and use fraud rules to fight back.

1:00 PM – 1:20 PM, EST
12:00 PM – 12:20 PM, CST
11:00 AM – 11:20 AM, MST
10:00 AM – 10:20 AM, PST

Add to calendar

SET 3  Two sessions happening concurrently

What Matters Now: Driving Engagement with Disengaged Members

BRIAN WERGER
Director
CUNA Mutual Group

Gain insights to help turn non-credit union members into fully-engaged consumers.

2:30 PM – 2:50 PM, EST
1:30 PM – 1:50 PM, CST
12:30 PM – 12:50 PM, MST
11:30 AM – 11:50 AM, PST

Add to calendar

Cyber Scams: Beware

KEN OTSUKA, CPA
Senior Consultant, Risk & Compliance Solutions
CUNA Mutual Group

Learn about the newest threat twists and ways to minimize the damage.

2:30 PM – 2:50 PM, EST
1:30 PM – 1:50 PM, CST
12:30 PM – 12:50 PM, MST
11:30 AM – 11:50 AM, PST

Add to calendar
The Inspiration Station is the place to further your strategic planning know how. At each station, you’ll find ideas and insights to help build your annual plan. Drop in anytime!

**Beyond the Basics:**
**Inspiration for Growth**

It doesn’t matter how good your loan portfolio looks today. The more competition your credit union faces, the more important it is for you to discover new sources of non-interest income. Go beyond the basics. Be inspired to grow your credit union in ways you’ve never imagined.

**Beyond Known Unknowns:**
**Ideas to Optimize Risk & Manage Losses**

You might be confident in your team and technology, but the world is changing at light speed; it’s hard to keep up. Gain practical ideas to protect your credit union against emerging risks and learn how to get ready for the new reality of regulations and compliance.

**Beyond Data Analytics:**
**Insights for Staying Competitive**

Staying relevant to your members isn’t as clear as it used to be. The dynamics of your members have changed so much that it can be hard to recognize them. What they want. What they need. Gain powerful insights on how to transform the way you do business using the data you already have.

**Beyond Employee Handbooks:**
**Inspire Your Employees**

The culture of your organization has never been more important, or more complicated. It takes more than a handbook to address your employees’ questions and inspire them to perform. Discover new ways to create a high-performance culture.

**Beyond Bricks & Mortar:**
**Engage Your Members**

Understanding it takes more effort to convert an opportunity into value is just the start. It takes strategic planning and alignment to ensure your relevance well into the future. Explore new ways to engage your members and improve their financial health.