symwest
USER GROUP

Wednesday, May 15, 2019
8:30 am – 4:00 pm

8:30 AM – 9:00 AM	**Registration** **Alkami** **Continental Breakfast sponsored by:**

9:00 AM – 9:45 AM	**What's New at Your CU** This is your chance to meet the other attendees and find out what everyone is working on.
9:45 AM – 10:15 AM	**Symwest Keynote Address** *Presented by: Ed Miller, Symitar*
10:15 AM – 10:45 AM	**Vendor Rapid Fire** This is your chance to hear the vendors one-minute elevator pitch and find out what services they offer.
10:45 AM – 11:15 AM	**Vendor Tech Expo**
11:15 AM – 12:00 PM	**Symitar Tips & Tricks** *Presented by: Jim Holden, Symitar* Since 2015, Symitar's SymAdvisor group has completed over 550 consulting engagements for 200+ clients, with an estimated collective savings for these clients of over $2 million a year in annualized labor expenses and over $1 million a year in annualized expenses or fee/interest recoupment. We will give you some tips and tricks we have learned from these engagements and discuss how a SymAdvisor engagement can benefit your credit union.
12:00 PM – 1:00 PM	**LUNCH Sponsored by:** ACCESS SOFTEK engage

Track 1 – Operations/Management		Track 2 – Programming/Technical	
1:00 PM – 1:45 PM	**Strategic Technology Plan** *Presented by: Heather Moshier, CU Engage* What is a Strategic Technology Plan? Is it a project list? Is it a list of priorities? Is it IT's wish list? A Strategic Technology Plan is a way to align IT resources and priorities to help achieve the credit union's strategic goals. The process developed to create a Strategic Technology Plan can be just as important as the Plan itself. Aligning technology strategies with the credit union's strategic goals helps IT be business enablers and stay in-line with the business to accomplish successes! We will share some lessons learned and tips for creating a Strategic Technology Plan.	**1:00 PM – 4:00 PM**	**Innovation Lab** *Presented by: Adele Glen, Cutek* In recent years, IT has learned how to programmatically tap into creative ideas, not just for its own internal purposes, but for the overall benefit to the credit union. More and more, innovative ideas are a way for credit unions to seek competitive advantage in a market full of fintech's where a steady pipeline of ideas, the ability to execute, and a rapid project iteration approach is the status quo. This workshop will demonstrate various innovation generating techniques as well as how to facilitate innovation events at your own credit unions. Attendees will work in small teams to generate innovative ideas as well as deliver their elevator pitches to the group to determine the most innovative idea of the day.
1:45 PM – 2:30 PM	**More Channels, More Members, More Money: Mobile Account Opening** *Presented by: Evan Barale, Access Softek* With a steady shift to consumer mobile-centric operations over recent years, CU's with a mobile-first perspective gain an indisputable market advantage. The ability to smoothly provide simple transactions for digital users on the go has the biggest impact on consumer satisfaction, loyalty and churn rate. By extending account opening into the mobile channel, your mobile-centric first impressions win new business and meet new members where they bank most often.		

2:30 PM – 2:45 PM	Break Sponsored by:	**///CU**solutions.GROUP

Track 1 – Operations/Management		Track 2 – Programming/Technical	
2:45 PM – 4:00 PM	**Radiate Relevance: How fusing the Elements of Technology, Design, and Delivery Together Can Inject New Life into Your Banking Strategy** *Presented by: Jason Sletten, DBSI & Jon Cannon, CFM, Inc.* What does the branch of the future and transformation really mean in today's fast-paced market? Is it a focus on engaging experiences? Shifting from transactional to advisory? Enhancing member discovery of products and services? Finding ways to migrate transactions to more efficient channels? Enabling Universal Associates and open branch designs? A mix of all of these? Join this interactive session to understand the strategy shift required to embrace the future of banking, along with real-life examples of how to fuse all the moving parts together for a future-proof strategy to remaining relevant long into the future.	2:45 PM – 4:00 PM	**Innovation Lab** *Presented by: Adele Glen, Cutek* **…Continue Session.**

Happy Hour from 4:00 – 6:00 PM at the Vendor Expo

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Thursday, May 16, 2019
8:30 am – 4:00 pm

8:30 AM – 9:00 AM	**Continental Breakfast Sponsored by:**

9:00 AM – 9:30 AM	**Symitar Updates & Roadmap** *Presented by: Ron Kaplan, Symitar* Join Symitar Product Management's Senior Manager to find out what is coming from Episys Development team in the next 24 months. This session's focus will be upcoming enhancements and major initiatives for the Episys core. Ron will also cover SEDB, compliance, and security roadmaps.
9:30 AM – 10:15AM	**Symitar NHS/PURE** *Presented by: Andrew Mazzare, Symitar & Clint Surginer, Pure Storage, Inc.* We continue to tune our offerings to be beneficial to both our EASE clients and In-House clients. Our new SQL Managed Services offering is just one example that applies equally to both. Stop by for a short informative session that covers several ways Symitar and JHA can provide resources and solutions that allow you to do everything you do better.
10:15 AM – 10:55 AM	**Vendor Tech Expo**
11:00 AM – 11:55 AM	**I Wasn't Hacked…Was I?** *Presented by: Jim Stickley, Stickley on Security* Jim Stickley has been robbing banks, hacking government computers, and stealing confidential information from businesses for over 30 years. In this unique session, Stickley will demonstrate how criminals are exploiting poorly designed features in web browsers, new tricks in social engineering, and how old security functionality is now being used against you. Most importantly, Stickley will show how seemingly insignificant actions can lead to complete and total compromise. From credit card exploitation to online account takeovers, this session covers a large range of attacks that put both home users and corporate employees at risk. As always, Stickley will provide useful tips and tricks to help you detect these and prevent you from falling victim to these types of attacks.
12:00 PM – 1:00 PM	**LUNCH Sponsored by:**

Track 1 – Operations/Management		Track 2 – Programming/Technical	
1:00 PM – 1:45 PM	**When is an IT project really not an IT project?** *Presented by: Scott Cowan, MVi* Most organizations rely on IT to find, install and implement projects that historically have fallen under the responsibility of the IT department. However, as programs have evolved, and capabilities increased, the lines of where these projects are best handled are requiring more and more time, effort and support from other departments in order to effectively take advantage of these higher functions afforded by these ever-evolving programs. MVI will be offering our best practices approach on how and when to best bridge the gap and how to recognize and involve other departments and resources to avoid the dreaded "Software on the Shelf" ineffective implementations.	**1:00 PM – 1:45 PM**	**PowerFrame** *Presented by: Lalit Singh, Symitar* Digital Transformation is a new industrial revolution, driven by technologies like "IOT-Internet of Things", "cloud", big data, Machine Learning, etc. PowerFrame is a digital platform being developed by Symitar to leverage some of these technologies to enable Branch digitalization and support digital transformation of Credit Unions. Please attend this session to understand the key features of the platform and reference apps like PowerFrame Batch, PowerFrame Docs and PowerFrame Productivity Suite apps

1:45 PM – 2:30 PM	**Should My Credit Union Consider Outsourcing?** *Presented by: Jordan Urso, Symitar* More credit unions converting to Symitar now choose EASE than in-house. It's no longer just smaller credit unions opting for jhaCallCenter. By the end of 2019 more than 18 credit unions with assets over $1 Billion will be processing with EASE. During the second half of 2018, an unprecedented number of existing Episys in-house clients made the decision to outsource with EASE. Natural disasters like wild fires and hurricanes and other weather-related catastrophes made disaster recovery a key reason, but many also say it's driven by a desire to "get out of the data center and infrastructure business to focus those resources instead on technology and credit union business." Come to this session and learn more about outsourcing with EASE and jhaCallCenter.

1:45 PM – 2:30 PM	**Making Code you Can Reuse** *Presented by: Mike Blumenthal, Technology Happens* I often get asked from engineers what should we learn next, this session we will explore what types of request Technology Happens receives and look at all the tools we have in our tool belt to not overcomplicate the project while still delivering value.

2:30 PM – 2:45 PM **Break Sponsored by:**	**PURE**STORAGE®

2:45 PM – 4:00 PM	**Business Digital Banking** *Presented by: Dee McKemy, Malauzai* How does a Credit Union take the next steps towards supporting its Business Members?

2:45 PM – 4:00 PM	**jhaEnterprise Workflow and the Value of Blending Solutions** *Presented by: Tracey Archer-Lawson, Symitar* Did you know that jhaEnterprise Workflow (EWF) can turn your manual checklists and workflows into automated processes? It can—even those that involve multiple departments and products!

Happy Hour from 5:00 – 7:00PM at the View House Centennial

Sponsored by:

CUTEK   **Stickley on Security SoS**

Friday, May 17, 2019
8:30 am – Noon

8:30 AM – 9:00 AM	**Continental Breakfast Sponsored by:**
9:00 AM – 9:45 AM	**Lessons Learned from a Salesforce Implementation** *Presented by: Pete DuPre and Genevieve Cavallo, Elevations Credit Union* Pete and Genevieve will share Elevations CUs experience in implementing Salesforce, how it works with Episys, and the lessons they learned along the way.
9:45 AM – 10:30 AM	**Setting up Episys for Business Members** *Presented by: Onalee Edwards, SELCO Community Credit Union* Looking to expand service to business members? How do you accommodate this group of members with a unique set of needs and compliance requirements? SELCO will walk through the necessary updates they uncovered (and how they uncovered them) as they embarked on a full-blown overhaul of the Commercial and Business Banking set up on Episys.
10:30 AM – 11:00 AM	**Vendor Expo & Networking Break Sponsored by:**
11:00 AM – 11:30 AM	**Simplifying GL Posting** *Presented by: Shaun Harper, Numerica CU* Shaun will walk through an efficiency project he implemented at Numerica for the Finance department to make GL Posting faster and more accurate using PowerOn, OpCon, ARCU, and Excel. This presentation will go over the errors previously being encountered, the steps looked at to convert the manual process used to post hundreds of GL Transactions monthly, the solutions deployed, and how the solution is now being deployed to other areas.
11:30 AM – Noon	**Rewards Round Table** *Facilitated by: James Burke-Fraser, JackHenry* What other CU's are offering, what can be done with core features, how to code it.