

Tuesday, May 9, 2023
8:00 am – 4:00 pm

8:00 AM – 9:00 AM	Registration 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 & Symitar Update <i>Presented by: Ed Miller, Symitar</i>	
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	Roadmap and Future of ARCU/EDS <i>Presented by: Rich Linton, Senior Manager, Product Management – Data and Analytics and Meg Bannister, Manager, Sales Engineering</i> Discussion on the roadmap and future of ARCU with Interactive Reporting with PowerBI, new lending and financial datamarts and goal improvements. We'll also discuss EDS with new use cases and future deployment options and how they sit within the credit union technology ecosystem.	
12:00 PM – 1:00 PM	LUNCH Sponsored by:  	
Track 1 – Operations/Management		Track 2 – Programming/Technical
1:00 PM – 1:45 PM	Using Data to Uncover Member Experience-Enhancing Opportunities <i>Presented by: Larky</i> Through data, credit unions can learn how to reach members on the right channel (i.e. desktop or mobile, email or mobile push notifications) and send the right messages based on member interests. For example, Larky was able to use its data to determine that push notifications addressing new product promotions and expansions often receive exceptional tap-through rates, indicating a desire from members to learn more about those topics. With that information, a credit union could more effectively communicate with its members and share insights that will actively improve their experience. In this presentation, Larky will share best practices for leveraging data to intuitively connect credit unions with their members.	1:00 PM – 2:30 PM PowerFrame Training (Part 1) <i>Presented by: James Burke-Fraser</i> Spend your day watching JBF fix issues and challenges the community commonly sees in their PowerFrame Docs. REMOTE OPTION: Microsoft Teams meeting Click here to join the meeting Meeting ID: 250 046 738 335 Passcode: ffrdPc
1:45 PM – 2:30 PM	The Trick to REAL Disaster Recovery Readiness... What You MUST Know! <i>Presented by: IMS</i> After 25 years of performing 1000's of DR Tests for credit unions and handling more real Disaster Recoveries than we care to count, IMS Cloud Services will share the secrets of Real Disaster Recovery Readiness. We'll spend an hour giving you the REAL SCOOP on why Disaster Recovery Readiness is a mixture of Art, Science, and Nerves of Steel. What you will learn: <ul style="list-style-type: none"> • How testing and real disasters are different. • What are the most important areas to pay attention to. • Areas where great teamwork makes a huge difference. • How Ransomware has flipped the script. • The reality of REAL recovery from a ransomware attack. • Why the more things change... The More They Stay The Same. 	
2:30 PM – 2:45 PM	Break Sponsored by: 	
Track 1 – Operations/Management		Track 2 – Programming/Technical
2:45 PM – 3:30 PM	How to Achieve a Member Centric Member Experience <i>Presented by: Adele Glenn, Cutek</i> Members are seeking a more personalized experience, and with the right touchpoint at the right time you can provide one. This session will explore the ways to configure your core to provide the most across all of your channels so that you are armed with the knowledge you need to enhance your member experience and most importantly employer your member's financial health journey.	2:45 PM – 4:00 PM PowerFrame Training (Part 2) <i>Presented by: James Burke-Fraser</i> Spend your day watching JBF fix issues and challenges the community commonly sees in their PowerFrame Docs
3:30 PM – 4:00 PM	To Zelle or Not to Zelle <i>Facilitated by: Jessica Johnson & KayCee Murray, Numerica CU & Laurie Antoszewski, Kitsap CU</i> Let's talk about the pros, cons, and lessons learned about Zelle, P2P, Fed Now, and what's coming....	

Happy Hour from 4:30 – 6:30 PM at the Vendor Expo

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8:00 AM – 9:00 AM	Continental Breakfast Sponsored by: 		
9:00 AM – 9:45 AM	How to Comply with the “No Junk Fees” Order <i>Presented by: Jason Howard, SymAdvisor</i> This session will include a review of the recent CFPB guidance on "junk fees", how this could impact your credit union, and how Symitar can support you.		
9:45 AM – 10:15AM	Impactful Workflows <i>Presented by: Sherrie Arruda, Symitar</i> Sherrie will show how you can create impactful workflows using tools such as Jack Henry's near real-time EDS and Jack Henry Enterprise Workflow.		
10:15 AM – 10:55 AM	Vendor Tech Expo		
11:00 AM – 11:55 AM	Securitysplaining by Stickley <i>Presented by: Jim Stickley, Stickley on Security</i> Jim will 'splain everything you thought you already knew about security and all the things you would like to pretend doesn't exist.		
12:00 PM – 1:00 PM	LUNCH Sponsored by:  		
Track 1 – Operations/Management		Track 2 – Programming/Technical	
1:00 PM – 1:45 PM	Power BI & Self Service <i>Presented by: Jason Bedsworth, CFS</i> Many good data and analytic programs support self-service of report creation and analysis for certain groups of end users. This encourages business leaders and analysts to become increasingly data driven in decision making. Why can this be so challenging? What are the practices in creating a self-service offering that lead to engagement and adoption by end users? In parallel to the ideal of becoming data driven in decision making through self-service analytics, Microsoft's Power BI is becoming a standard in many credit unions. What does it offer to help delivery self-service and data driven decision making? Are the considerations when implementing Power BI as a self-service tool? This session will address the challenges to becoming successful with self-service analytics and do so using Power BI.		Accounting for Developers: Improving Understandings of CU Financials to Improve Your Code (Part 1) <i>Presented by: Adele Glenn, Cutek</i> This session is designed for developers and IT employees that work on applications that handle money in any way. You may work in the code, or perhaps you are responsible for managing the integrations for your core. We think that every engineer that builds or maintains such systems benefits from knowing the core principles of accounting. We will cover the basics of accounting, general ledgers, and and even dive into a few examples of the ways that technology and accounting can come together for the benefit of all.
1:45 PM – 2:30 PM	What the Heck is Humanized Digital Banking? <i>Presented by: Denny Howell, Mahalo</i> Denny will discuss about this fascinating concept. The term person centric has been thrown around a lot but until you see this session you will never know what this truly means.		
2:30 PM – 2:45 PM	Break Sponsored by: 		
2:45 PM – 3:30 PM	Let's Talk About ODT, Let's Talk About You And Me, Let's Talk About All the Good Things... <i>Facilitated by: Mark Fox, Numerica CU, John Ryan, SELCO Community CU,</i> Authorize positive, settle negative? No-fee NSF? This session will be a discussion on CUs are adapting to the changes in overdraft, NSF, and Courtesy Pay and how CUs are determining what makes the most sense for them.		Accounting for Developers: Improving Understandings of CU Financials to Improve Your Code (Part 2) <i>Presented by: Cutek</i> Continuation of accounting for developers.
3:30 PM – 4:00 PM	Sneak Peek at Release 2023.00 <i>Presented by: Sherrie Arruda, Symitar</i> Sherrie will give us a sneak peek at some of the cool, new features in Symitar Release 2023.00.		

Happy Hour from 5:00 – 7:00PM Lake Coeur d'Alene Cruise
Sponsored by:



Thursday, May 11, 2023
8:30 am – Noon

8:00 AM – 9:00 AM	Continental Breakfast Sponsored by: 
9:00 AM – 9:45 AM	Crypto Conversations <i>Facilitated by: Matt Rykaczewski, Matanuska Valley Federal Credit Union & Curt Bannock, Southland CU</i> Matt and Curt will be leading a discussion on crypto including sharing insights and future plans, as well as discussing the impact to CUs, and options available for CUs.
9:45 AM – 10:30 AM	Beyond the Core: Orchestrating Workflow through Innovation <i>Presented by: Joshua Mollohan, Sound Credit Union</i> How Sound Credit Union leveraged SymXchange to overcome a common pain point, and wound up with a staff portal where member-centric workflows with complex business logic and multiple system integrations are saving our staff hours and minutes daily.
10:30 AM – 11:00 AM	Vendor Expo & Networking Sponsored by: 
11:00 AM – 11:30 AM	CU Build <i>Presented by: Brad Hicks (American Airlines CU) & Adele Glenn (Cutek)</i> CU Build is a team of credit union volunteers hosting a first of its kind cross-credit union build-a-thon on the Symitar ecosystem. A build-a-thon is an event where programmers, business experts, and other innovators get together to solve real-world problems in a sandbox environment that has access to cutting edge tools, services, and platforms. The team is excited to share with you plans for the 2020 build and ways in which you can get involved. Learn about the event, what to expect and what CU Build is hoping to achieve with this groundbreaking initiative.
11:30 AM – Noon	Symitar Weekend Update <i>Presented by: James Burke-Fraser</i> JBF will be hosting a Symitar version of SNL's weekend update to give show us new features and options that have been added to Symitar in the last few releases.