symwest
USER GROUP

Wednesday, May 15, 2024
8:00 am – 4:00 pm

8:00 AM – 9:00 AM	**Registration** **Continental Breakfast sponsored by:** ASCENSUS.

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** *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	**Financial Crimes Defender** *Presented by: Jack Henry* Learn about what Jack Henry is doing in the Financial Crimes space with Financial Crimes Defender - our newest Artificial Intelligence/Machine Learning, real time Fraud/AML/BSA platform. Defender is JH's go forward strategy, hear how it all ties together into our Technology modernization
12:00 PM – 1:00 PM	**LUNCH Sponsored by:** SMA TECHNOLOGIES | narmi

Track 1 – Operations/Management		Track 2 – Programming/Technical	
1:00 PM – 1:45 PM	**Decoding Automation: Unraveling Automation Tools and Terms to Achieve End-to-End Automation in Your CU** *Presented by: SMA Technologies* There's no shortage of acronyms when it comes to the various types of automation and orchestration. From RPA to BPA to WLA and beyond, it can all feel a bit like alphabet soup. To make sure you implement the right automation solutions for your business, it's crucial to understand the differences between each one and the role each one plays in your credit union. This session will not only break down the different types of automation—it will equip you to implement end-to-end automation—no breaking points, no silos, and most importantly no human intervention.	1:00 PM – 2:30 PM	**Power BI Beyond the Basics** *Presented by: CFS Insight* This class is for those familiar with the basics of Power BI development but who are experiencing challenges with establishing greater re-use within their creation of content, improving performance and/or building data sets that enable you to really wow the senior team. CFS will unpack many of the concepts that it employs when building Power BI models that are included with its software solutions. Participants can gain hands on experience and thought leadership on how they can take their Power BI deployments to the next level.
1:45 PM – 2:30 PM	**Mastering Implementation: Keys to Identifying a Vendor Partner** *Presented by: Narmi* Join us for an insightful session on the essential criteria Financial Institutions on Symitar need to keep in mind when choosing the right vendor partner. This session will walk through how to set your financial institution up for success when gathering initial information, how to set repeatable processes, best practices for testing, and how to utilize PowerOns. Gain insights into effective strategies for continuous improvement and support beyond initial implementation, empowering your financial institution to achieve accelerated results and operational efficiency.		
2:30 PM – 2:45 PM	**Break Sponsored by:** teleVoice		

Track 1 – Operations/Management		Track 2 – Programming/Technical	
2:45 PM – 3:30 PM	**SymAdvisor Roundtable: Hot Topics** *Presented by: Erica Switalski, Jack Henry* Learn more and discuss trending hot topics such as managing recommended "predatory" fee changes, loan rate changes optimization, and what does "member centric" mean to your CU and how can JH support you.	2:45 PM – 4:00 PM	**Become the Indiana Jones of your CU** *Presented by: Technology Happens* This interactive class will present and discuss the important technology trends and disciplines that will impact the success of the Credit Union in 2024 and beyond. We'll talk about technology islands, deserts, sinkholes, expeditions, and generations. The goal of this class is to empower each attendee to know the important technology trends and disciplines and how to navigate each so they may deliver improved results for their Credit Union.
3:30 PM – 4:00 PM	**"Cultivating Future Tech Innovators: Nurturing Developers from the Ground Up"** *Facilitated by: Adele Glenn, Cutek* Unlock the secrets of CUTEK's "farm" system which has led to great successes in fostering a new generation of skilled developers - all trained from scratch. In this dynamic session, participants will delve into the art and science of cultivating raw talent into thriving tech professionals. Participants will leave equipped with the knowledge and tools to nurture raw talent into thriving developers, fostering innovation and diversity in the ever-expanding tech landscape.		

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

Sponsored by:

Time	Session
8:00 AM – 9:00 AM	**Continental Breakfast Sponsored by:** RESEDA GROUP
9:00 AM – 9:45 AM	**Harnessing the Power of Jack Henry Symitar Data** *Presented by: Jack Henry* See how Jack Henry's newest efforts can enable your Credit Union to better leverage your data to meet your business needs.
9:45 AM – 10:30AM	**Micro Apps & HTML** *Presented by: Jack Henry* This session will show off the new HTML Teller Transaction and Account Manager work areas. It will also highlight some micro apps.
10:30 AM – 11:00 AM	**Vendor Tech Expo**
11:00 AM – 11:55 AM	**Education in Security by Stickley** *Presented by: Jim Stickley, Stickley on Security* Jim will educate you on everything you need to know about security threats to you and your members.
12:00 PM – 1:00 PM	**LUNCH Sponsored by:** CFS Insight · catalyst · TECHNOLOGYHAPPENS

Track 1 – Operations/Management		Track 2 – Programming/Technical	
1:00 PM – 1:45 PM	**Habits of Highly Effective Data Analytic Programs** *Presented by: Jason Bedsworth, CFS Insight* The most effective analytics programs at credit unions are built on 3 key habits: (1) Creating a culture of data-driven decision-making; (2) Building a learning environment around analytics and, (3) Focusing attention on a few critical metrics that drive your organization's success. Join this panel discussion as analytics leadership from successful credit unions share how they are applying these key habits to better serve their operations and members. Take home proven strategies that will enable you to exceed your growth goals, eliminate thousands of hours of manual reporting tasks and optimize investments utilized to grow and engage membership. This session is designed for all management levels and data/analytic team members	1:00 PM – 2:30 PM	**The Solution Room: Collaborative Problem-Solving for Innovative Solutions** *Presented by: Adele Glenn, Cutek* Welcome to The Solution Room, an interactive and dynamic session designed to harness the collective wisdom and creativity of our diverse community. In this engaging and participatory session, we invite you to step into a collaborative space where challenges transform into opportunities for innovative solutions.
1:45 PM – 2:30 PM	**Payments Strategy – The Demand and Adoption of Instant Payments** *Presented by: Catalyst* Momentum continues to build as financial institutions move forward with the implementation of faster payment solutions. The FedNow® Service went live in July 2023 and is gaining widespread adoption. Additional faster payment capabilities including RTP, Visa Direct, MasterCard Send and Same Day ACH are enabling innovation and efficiency for both consumers and businesses. We will discuss the transformation in payments with a goal to instantly be able to transact and settle a payment to anyone, anywhere, at any time. We'll also discuss the industry drive toward ubiquity and how the collaboration of corporate credit unions and banker's banks are working together in driving adoption.		
2:30 PM – 2:45 PM	**Break Sponsored by:** IMS		
2:45 PM – 3:30 PM	**Mergers Demystified** *Facilitated by: Technology Happens* This session will focus on the increasing trend for Mergers in the Financial Services Industry. We will first look at the primary drivers of this hot trend and then review the critical steps that must be managed to ensure the success for any Merger.	2:45 PM – 4:00 PM	**The Solution Room: Collaborative Problem-Solving for Innovative Solutions (Part 2)** *Presented by: Cutek* Continuation of part 1.
3:30 PM – 4:00 PM	**Data Discussions** *Presented by: Facilitated by Kelly Gage (Red Canoe CU), John Ryan (SELCO Community CU) and Melanie Whalen (Numerica CU)* Hear how CUs are tackling data quality, predictive analytics, data governances and more…		

Happy Hour from 5:00 – 7:00PM at Dystopian State Brewing Company
Sponsored by:

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Friday, May 17th, 2024
8:30 am – Noon

8:00 AM – 9:00 AM	**Continental Breakfast Sponsored by:** **SYCORR®**
9:00 AM – 9:45 AM	**How Easy is Ease?** *Facilitated by: Becky Navarre (iQ CU), Scott Nerger (Numerica CU)* Becky and Scott, long time on-prem core experts, will share the lessons they've learned moving to EASE. They'll answer your questions and talk about the pros and cons of EASE.
9:45 AM – 10:30 AM	**SymXchange Developer Roundtable** *Facilitated by: Carson Ketter, Josh Mollohan (Sound CU)* SymXchange isn't extensively formally documented, and sometimes building a network of fellow developers is the best informal documentation around. They'll lead a discussion on successes, challenges, best practices, and lessons learned.
10:30 AM – 11:00 AM	**Vendor Expo & Networking**
11:00 AM – 11:30 AM	**CU Build** *Presented by: Brad Hickey (American Airlines CU)* 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	**PowerOn Marketplace** *Presented by: James Burke-Frazier, Jack Henry* Have you looked at PowerOn Marketplace lately? Do you know how much free code is ready and waiting for you? JBF is going to give a guided tour of PowerOn Marketplace and show you all the ways you can save time but leveraging the solutions other CUs have already tried, tested, and implemented.