

“THE ONES IN RED” PRESENT

Business Development
& Marketing Conference

■ FEBRUARY 20 – 22, 2018 ■

And

Maximizing Your Credit
Union’s Earnings Conference

■ FEBRUARY 22 – 25, 2018 ■



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Business Development & Marketing Conference

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- Exceeding Member Expectations
- Strategic Marketing 2.0: Integrating Content, Engagement And Social Media Strategies
- Getting More Strategic About Growth
- The New Landscape Of Credit Union Marketing
- Realigning Your Management Structure For Business Development Results
- Key Steps To Growing Your Loan Portfolio
- Speaking The Language Of Millennials

*Address The Challenges Of
Business Development &
Marketing To Your Members*

Maximizing Your Credit Union's Earnings Conference

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- Top 100 Credit Unions In Profitability
- Loan And Share Pricing Mistakes That Impact Earnings And Capital
- Selecting Critical Vendors
- Managing Your Media Dollars In A Constantly Fragmenting Landscape
- Attracting And Retaining Quality Credit Union Members: Are You Ready To Compete?
- Engaging Today's Consumer – Everything Has Changed
- 3 Keys For Your CU To Survive In A Crowded Market: *Brand + Community + Plan*

*Get On The Right Path
To Increasing Your
Credit Union's Earnings*

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DRESS CODE: CU Conferences wants our attendees to feel comfortable during all meals, educational sessions and the welcoming reception. Feel free to wear whatever is comfortable. As it is often cool in meeting rooms, a sweater or light jacket is recommended.

TRAVEL INFORMATION: For assistance with airfare & car rental please call *Altair Travel & Cruises*: 800-264-3316; Mon. – Fri.; 8:30 a.m. – 5 p.m. CST (*nominal service fee applies*)



Save Even More By Registering Early

REGISTRATION INFORMATION Page 8



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Business Development & Marketing Conference



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■ **TUESDAY, FEBRUARY 20, 2018** ■

Tentative Schedule – subject to change

5:00 – 6:00 p.m. *Business Development & Marketing Conference Registration*

6:00 – 7:00 p.m. (GP) *Welcome Reception* Enjoy cocktails, light dining & networking with other credit union leaders from across the country and **“The Ones In Red”!**

■ **WEDNESDAY, FEBRUARY 21, 2018** ■

8:30 – 9:00 a.m. *Conference Registration*

11:35 a.m. – 12:35 p.m.

9:00 – 9:15 a.m. **Opening Remarks**

Getting More Strategic About Growth

9:15 – 10:15 a.m.

*Celeste Cook, CEO/Founder,
cuStrategies, LLC*

Exceeding Member Expectations

**Lynn Guiliani, CSP, President/Founder,
Progressions, Inc.**

■ **PART ONE** ■

Only your members define your true success, by their loyalty, referrals and repeat business. Their choice of using your credit union to help them with their financial needs is what makes your credit union grow. To earn that choice you must be ahead of your competitors in service, products and delivery.

What can your credit union do to build a solid, sustainable strategic plan to maximize growth and profitability?

Lynn will explore a new way of exceeding member expectations by going beyond the norm. Brisk table exchanges and new ideas will send you back to your credit unions with stimulating initiatives.

Credit unions across the nation must find ways to become more relevant in order to sustain growth in an uncertain economy. Successful credit unions must be responsive to the needs of consumers and strategize to build a strong brand and foundation for long-term sustainability.

10:15 – 10:30 a.m. **Networking/
Refreshment Break**

During her presentation Celeste will . . .

10:30 – 11:30 a.m.

**Strategic Marketing 2.0:
Integrating Content, Engagement
and Social Media Strategies**

**Hilary Reed, Chief Strategist,
Empower Strategic Solutions**

- Explore a holistic leadership perspective for long-term growth and profitability
- Identify the “Seven P’s” that impact growth and profitability, particularly among millennials
- Explore “start/stop/change” strategies that will transform your credit union
- Determine the best approach to create greater relevance for your members and in your communities and/or SEGs

*This two-part session
will continue after
the group luncheon*

Strategic marketing 2.0 unlocks the secrets to creating a seamless integration of content, engagement and social media strategies into your marketing plan. Unifying all marketing efforts and channels is more important than ever in today’s evolving environment. Developing an all-encompassing plan that provides strategic direction for a variety of initiatives is the key to success.

12:35 – 1:35 p.m. (GP) *Sit-Down Luncheon*

1:35 – 2:35 p.m.

Getting More Strategic About Growth

■ **PART TWO** ■

Hilary’s timely session shows you how to compile a multi-dimensional marketing plan that coordinates all of the necessary strategic elements.

Rejoin Celeste Cook as she continues her discussion on how your credit union can respond to the needs of consumers and strategize to build a strong brand and foundation for long-term success and sustainability.

(conference continues on page four)

■ WEDNESDAY, FEBRUARY 21, 2018 (continued) ■

2:40 – 3:40 p.m.

The New Landscape Of Credit Union Marketing

Bill McKenna, *Vice President of Marketing, American Heritage Credit Union*

It's a time of unprecedented change in the financial services marketplace and credit unions are not excluded from the challenges that lie ahead. Younger borrowers must replace aging depositors, and every credit union needs to rethink its marketing strategy for today and tomorrow. Your credit union must have a clear, strategic and actionable marketing plan now—and time is not on your side.

- Time-tested marketing strategies that guarantee measurable ROI
- Our “bread & butter” for increasing income today
- What ingredients will positively impact your brand?
- How to grow and increase profitable member relationships

3:40 – 4:00 p.m.

Daily Wrap-Up

■ THURSDAY, FEBRUARY 22, 2018 ■

8:00 – 9:00 a.m. (GP) *Sit-Down Breakfast*

9:00 – 9:05 a.m. **Opening Remarks**

9:05 – 10:05 a.m.

Realigning Your Management Structure For Business Development Results

Tom Glatt, Jr., *Executive Consultant/Owner,
Glatt Consulting Group, Inc.*

Business development for most credit unions means developing productive, lucrative relationships with individuals and businesses. Despite the meaning and intent of business development, efforts often fall short of achieving intended results. While the skills of business development officers can be partly to blame, misaligned credit union organizational structure is more often the root cause of poor performance. The question is, what is the right way to align the organization?

In this session Tom will share insight gleaned from a year's worth of study of the organizational alignment and placement of business development departments at leading institutions. You'll leave with effective ideas and strategies for reorganizing your business development efforts for maximum performance and results.

10:05 – 10:20 a.m. **Networking/
Refreshment Break**

10:20 – 11:20 a.m.

Key Steps To Growing Your Loan Portfolio

Ancin Cooley, CIA, CISA, *Principal,
Synergy Credit Union Consulting*

To effectively grow your loan portfolio and increase earnings several things need to be in concert.

10:20 – 11:20 a.m. (continued)

- Understanding Your Risk Appetite
- Improve Your Sales Process
- Manage Your Talent Risk

In this entertaining and insightful presentation, Ancin Cooley of Synergy Credit Union Consulting will show you how to understand and implement all three areas.

11:25 a.m. – 12:25 p.m.

Speaking The Language Of Millennials

Holly Arter, *Marketing Strategist,
Braid Creative*

The ways in which millennials receive and take in information is changing how the rest of the world communicates, from Facebook to emojis.

Holly will examine different ways that your credit union can tap into this changing landscape and strengthen your credit union's efforts at targeting millennials.

Learn how your credit union can maximize its greatest marketing asset towards this segment—its own millennial employees.

12:25 – 12:45 p.m. **Conference Wrap-Up**

*We Hope You Can Stay And Continue
Your Educational Experience At
CU Conferences' Maximizing Your
Credit Union's Earnings Conference!*

Maximizing Your Credit Union's Earnings Conference



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■ THURSDAY, FEBRUARY 22, 2018 ■

5:00 – 6:00 p.m. *Registration For Maximizing Your Credit Union's Earnings Conference*

6:00 – 7:00 p.m. (GP) *Welcome Reception* – Maximizing Your Credit Union's Earnings Conference participants & guests and those continuing on from the *Business Development & Marketing Conference* join *"The Ones In Red"* for cocktails, light dining, and great conversation.

■ FRIDAY, FEBRUARY 23, 2018 ■

8:00 – 9:00 a.m. (GP) *Sit-Down Breakfast*

9:00 – 9:15 a.m. **Opening Remarks**

9:15 – 10:15 a.m.

Top 100 Credit Unions In Profitability

Rory Rowland, President, Rowland Consulting

Competition is intense, and one way to stay a step ahead of the pack is knowing how to boost the bottom line. How do the best credit unions increase net income so they can grow? To paraphrase the Old Prospector, "There's gold in them thar income statements."

Rory will show you how to boost the bottom line while keeping the CU vision of "people helping people."

10:15 – 10:30 a.m. **Networking/
Refreshment Break**

10:30 – 11:30 a.m.

Loan And Share Pricing Mistakes That Impact Earnings And Capital

**Ancin Cooley, CIA, CISA, Principal,
Synergy Credit Union Consulting**

All too often, in an effort to provide credit opportunities, credit unions do not properly price the risk in their loan portfolios. This practice places the credit union's continued viability at risk and also impacts its ability to help members in the future.

In this important session, Ancin will provide insight on how to effectively price loans and shares in a manner that accounts for credit risk and your members' needs.

11:35 a.m. – 12:35 p.m.

Selecting Critical Vendors

**Tom Glatt, Jr., Executive Consultant/Owner,
Glatt Consulting Group, Inc.**

Vendors are part of the broad infrastructure that drives the delivery of products and services to your members. Vendors that properly support your strategies will strengthen your infrastructure, greatly enhance your competitive ability and help make your members happy. Vendors that do not match your strategies will

11:35 a.m. – 12:35 p.m. (continued)

weaken you, leading to poor service delivery, competitive disadvantage and broad member dissatisfaction.

Vendor selection is a critical task. But how do you ensure that the vendors you choose are right for you? . . . with a proper and thorough method for vendor evaluation and selection. In this in-depth presentation you'll explore such a model, discussing in detail the steps you need to take to ensure your vendors add value not only to the credit union's infrastructure, but to the process of building profitable, long-lasting member relationships.

12:35 – 1:35 p.m. (GP) *Sit-Down Luncheon*

1:35 – 2:35 p.m.

Managing Your Media Dollars In A Constantly Fragmenting Landscape

**Holly Arter, Marketing Strategist,
Braid Creative**

Reach the people you really want listening, with the messages and media that meet them where they are.

Media strategist Holly Arter will guide you through the latest research regarding how people are spending time with TV, radio, smartphones, video games and online.

What is the right decision for your credit union?

By looking at media consumption trends across the country, this session will help you navigate making smarter marketing decisions, no matter what the budget.

2:40 – 3:40 p.m.

Attracting And Retaining Quality Credit Union Members. Are You Ready To Compete?

**Bill McKenna, Vice President of Marketing,
American Heritage Credit Union**

This lively and important session is perfect for credit union leaders looking for some solid, real-life solutions to achieving positive membership growth and penetration. Led by Bill McKenna, he will focus on tangible marketing strategies, tactics and elements that will allow you to make the most of your opportunities to attract new members.

(conference continues on page six)

Maximizing Your Credit Union's Earnings Conference

■ FRIDAY, FEBRUARY 23, 2018 (continued) ■

2:40 – 3:40 p.m. (continued)

During Bill's session you'll learn about the many proven ideas that will help you grow and increase profitability.

- The effect a strong brand has in attracting members
- The role branches play in your future growth
- Marketing concepts that bring new members in the door
- Segmented marketing approaches that work
- How to build profitable new member relationships
- What members and non-members really know about your credit union
- How to better penetrate your existing membership base
- How to attract new groups to your credit union

3:40 – 4:00 p.m. Daily Wrap-Up

■ SATURDAY, FEBRUARY 24, 2018 ■

8:00 – 9:00 a.m. (GP) *Sit-Down Breakfast*

9:00 – 9:15 a.m. Opening Remarks

9:15 – 10:15 a.m.

Engaging Today's Consumer – Everything Has Changed

Keith Brannan, CMO, Kasasa

- **PART I** ■ Consumer engagement is a key driver of growth, profit, and retention for community financial institutions. It's the way consumers—and specifically millennials—shop for a new financial institution. The majority of consumers believe their financial institution does a poor job when it comes to experience and engagement. And it's becoming increasingly difficult for community financial institutions to deliver an excellent omnichannel experience. Join Keith and learn about:
 - How technological advancements have evolved consumer behaviors
 - Tactics credit unions are adopting to keep up
 - The types of products and technology consumers want—and ways to implement them that both improve member experience & increase profitability
 - Where in the consumer journey you can increase engagement to take profit and growth to new heights

This session will continue after group luncheon

10:15 – 10:30 a.m. Networking/
Refreshment Break

10:30 – 11:30 a.m.

Engaging Today's Consumer – Everything Has Changed

- **PART II** ■ Isn't it time you turned a marketplace reality into a competitive advantage? In the second half of this critical discussion, Keith Brannan will

10:30 – 11:30 a.m. (continued)

continue to explore the latest trends and techniques in engaging today's consumer.

11:35 a.m. – 12:35 p.m.

3 Keys For Your CU To Survive In A Crowded Market: Brand + Community + Plan

Nicolette Lemmon,

President, LemmonTree Marketing Group
Founder, Credit Union Marketing Univeersity

Across the financial landscape, things have continued to change as digital competitors have appeared without the encumbrance of physical locations. It's tough to keep up with expanding mobile services and 60-second online lender decisions, but add in maintaining legacy systems, staffing branches, and low loan margins . . . credit unions have so many priorities.

While credit unions have the potential to capture their members' financial services for a lifetime relationship, the millennial/Gen Y segment is not acting the same as their Gen X & baby boomer parents. Plus, boomers have moved into their senior years. Capturing new members, gaining more of their financial services and keeping the existing member business requires a cohesive brand and marketing strategy. Learn the three key factors for surviving in a crowded financial marketplace:

- *The brand team*—How to create a successful brand embodied by the faces of your credit union
- *Your community*—How to develop your credit union "tribe," using research and outreach that enhances a sense of belonging
- *The focused plan*—How to build a marketing plan to truly support member, loan/deposit, and non-interest income growth

12:35 – 12:45 p.m. Conference Wrap Up

SUNDAY, FEBRUARY 25, 2018 ■ TRAVEL DAY – *Have A Safe Trip Home!*

HOTEL ACCOMMODATIONS:

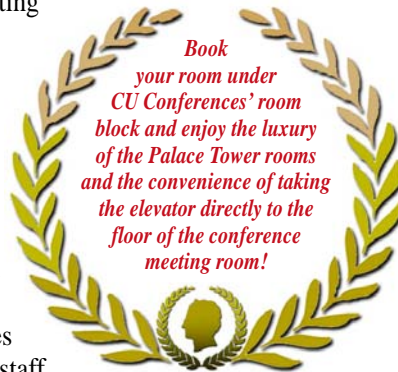
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Our conference **Guest Program (GP)** enables your registered guest to join you during the events of an individual conference or **enjoy the activities of both guest programs.**

* *Separate Registration Required*

Business Development & Marketing Conference

FEBRUARY 20 – 22, 2018

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- Welcome Reception
- Sit-Down Breakfast
- Sit-Down Luncheon

Maximizing Your Credit Union’s Earnings Conference

FEBRUARY 22 – 25, 2018

Guest Program For Only \$239

- Welcome Reception
- Two Sit-Down Breakfasts
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Attend Business Development & Marketing Conference *And* Maximizing Your Credit Union's Earnings Conference For Best Educational Experience, Maximum Networking Opportunities & Greatest Savings!

Check Conference(s) You Will Attend And Amount Based On Registration Deadline Date Selected

Both Conferences <input type="checkbox"/>	<input type="checkbox"/> Business Development & Marketing Conference	1ST PARTICIPANT: Name _____ Title _____ Nickname for ID Badge _____ Email Address _____ Guest Name _____ Guest Nickname for ID Badge _____
	<input type="checkbox"/> Maximizing Your Credit Union's Earnings Conference	
	<input type="checkbox"/> \$1645 On or Before December 20, 2017 <input type="checkbox"/> \$1045	
	<input type="checkbox"/> \$1695 December 21, 2017 Through January 18, 2018 <input type="checkbox"/> \$1095	
<input type="checkbox"/> \$1745 January 19, 2018 and Beyond <input type="checkbox"/> \$1145	<input type="checkbox"/> \$399 Business Development & Marketing Guest Program <input type="checkbox"/> \$199	2ND PARTICIPANT: Name _____ Title _____ Nickname for ID Badge _____ Email Address _____ Guest Name _____ Guest Nickname for ID Badge _____
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There are no refunds for cancellations made less than 10 business days prior to the conference date. However, your credit union may apply the paid registration fee to any future conference. Registrants who do not attend are liable for the full conference fee.

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At CU Conferences® we've been dedicated to educating the credit union community exclusively since 1979. And we are proud to note that many who attend our conferences are loyal, repeat participants.

What sets us apart? The relaxed atmosphere, sit-down meals and meeting environments that are perfect for plenty of networking and for allowing you the personal attention you deserve. Should you need anything at all while you're at our conferences – if you have questions, problems or even if you just want to shoot the breeze – look for a member of our CU Conferences® staff.

We appreciate your participation, and we're here to do whatever it takes to make your conference experience a cut above the rest.



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