

**“THE ONES IN RED” PRESENT**



# ANNUAL SOCIAL MEDIA CONFERENCE

*What Every Credit Union Needs To Know!*

■ **JULY 12 – 15, 2018** ■

*Renaissance Boston Waterfront Hotel*

**BOSTON, MASSACHUSETTS**

**ABOUT THIS CONFERENCE:** Social Media is here to stay! But there are so many questions & challenges that come along with using this powerful tool. What social media channels are best for your credit union? How much should you spend on social media marketing? What about the legal aspect of social media? What is your credit union's social media strategy?

*New* **INTERACTIVE  
SESSIONS BASED ON  
Your SUGGESTIONS!**

Join CU Conferences® and some of the top social media experts to answer these important questions and more.

**WHO WILL ATTEND:** Credit Union Social Media Specialists ■ Business Development & Marketing Managers ■ CEOs & Senior Management Directors ■ Supervisory Committee Members ■ *And Many Others!*



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Educating The Credit Union Community <sup>✓</sup> Since 1979

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# ANNUAL SOCIAL MEDIA CONFERENCE

*What Every Credit Union Needs To Know!*

## THURSDAY, JULY 12, 2018

*Tentative Schedule – subject to change*  
*Your Registered Guest Is Welcome To Join You At These (GP) Events*

■ 10:00 a.m. – 1:00 p.m. **Conference Registration** ■

### *Optional Bonus Session*

**10:30 – 11:30 a.m. Unleash The Power Of Social Media**

Perhaps your credit union has been using social media for quite some time, but you need some pointers to unleash the power of the social media channels. Maybe your credit union is just beginning to use social media as a marketing tool to reach your members.

Join some of our conference presenters as they work with you one-on-one to guide you through fine-tuning your personal social media accounts, including Facebook, Twitter, and more. Utilize this time to ask specific questions relevant to your marketing goals before delving into the rest of the conference sessions. You will learn just how powerful social media can be for your credit union.

*Enhance Your Education By Attending This Bonus Session!*

**11:30 a.m. – 1:00 p.m. Lunch On Your Own**

**1:00 – 1:15 p.m. Opening Remarks**

**1:15 – 2:15 p.m. How To Identify Social Media Legal Risks**

**Ethan Wall, President/CEO, Social Media Law And Order Education, LLC**

Credit unions can be exposed to serious legal risk arising out of their employees' personal and professional social media use. Ethan will teach you how to determine the scope & extent of legal & regulatory risks arising out of your CU's social media activities and share proactive steps to avoid lawsuits, including:

- A comprehensive understanding of federal laws and social media regulations that you must know to protect your credit union
- Examples of how financial laws & regulations apply to CU social media use
- How to conduct a social media risk assessment to determine the scope and extent of problems that can put the credit union at risk

**2:15 – 2:30 p.m. Networking/Refreshment Break**

**2:30 – 3:30 p.m. What Matters Now: How To Engage Multi-Cultural Audiences On Social Media**

**Marji Sherman, Manager, Social Media/Consumer Experience, CUNA Mutual Group**

Multicultural consumers have emerged as the #1 consumer force in the country, accounting for 61% of the credit union growth.\* Understanding the unique values and experiences of multicultural consumers helps credit unions make closer connections to better serve this growing segment of the population. Spend time learning insights from CUNA Mutual Group's What Matters Now research focusing on the multicultural segment, followed by a presentation on how to apply them to your consumer social media strategy.

*\*The Collage Group, Latinum Network: Understanding Financial Needs and Habits of Underserved Customers, 2017*

**3:30 – 3:45 p.m. Daily Wrap-Up**

**5:00 – 6:00 p.m. (GP) Welcome Reception**

**Cocktails. Light Dining. Valuable Networking Opportunities!**

## FRIDAY, JULY 13, 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.**

**Should You Fire Over Facebook? Managing Credit Union Employees Social Media Use Under Federal Law**

**Ethan Wall,**  
*President/CEO, Social Media Law And Order Education, LLC*

Credit unions can be held responsible for what their employees say on social media, but human resource professionals who discipline their employees due to social media can violate serious federal laws. Attend this session to learn how to lawfully manage employee social media use through:

- A deep understanding of how federal labor law applies to employee social media use
- A step-by-step guide to determining what employee social media use is protected by federal law and what employee activity may be disciplined.
- Strategies to develop a social media policy, implementation procedures, and training program to ensure that employees are managed lawfully.

**10:15 – 10:30 a.m.**

*Networking/Refreshment Break*

**10:30 – 11:30 a.m.**

**Ridiculously Powerful Facebook Targeting**

**Brett Jackson, CEO, Systemax**

Facebook has rapidly become the social media platform of choice for marketers, but getting traction from posts can be challenging. What if you could take your Facebook presence a step further? Facebook's Custom Audience is a powerful tool which allows you to create lists of people you want to target, based on criteria you set.

This session will guide you through the ins and outs of building effective custom audiences, how to better use them to create successful marketing campaigns, how to implement audience exclusion and inclusion, how to better target members and prospects, and more.

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**FRIDAY, JULY 13, 2018**


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*(continued)*

11:35 a.m. – 12:35 p.m.

**Strategies To Drive  
Social Media Success**
**Tom Glatt, Jr.,**
*Principal/Strategy Consultant,  
Glatt Consulting Group, Inc.*

**PART I:** To take effective advantage of the greatest benefits social media has to offer, you need to know these three things:

- What you want out of social media
- What works on social media
- How to protect yourself on social media

In this in-depth, two-part *This Presentation* conference session, *Will Continue After* strategy consultant *Sit-Down Luncheon* Tom Glatt, Jr. will delve into these three critical pillars of social media success, sharing actionable strategies you can use at your credit union to turn social media into a powerful, functional tool.

12:35 – 1:35 p.m. (GP)

*Sit-Down Luncheon*

1:35 – 2:35 p.m.

**Strategies To Drive  
Social Media Success**

**PART II:** Join Tom Glatt, Jr., for the second part of his educational session, in which he'll share actionable strategies you can use at your credit union.

2:40 – 3:40 p.m.

**How Much Money  
Should Your Credit Union Spend  
On Social Media Marketing?**
**Natalie Powers,**
*Vice President/Strategy & Client Services,  
Third Degree*

As social media trends, algorithms and purposes change, so do your credit union's needs and budgets within the medium. Learn how to best integrate your social media into current digital marketing while maintaining a relevant, fresh approach with five easy tips from Natalie Powers.

Learn what other financial institutions are spending on social media and how much you should be spending—or saving.

3:40 – 4:00 p.m. *Daily Wrap-Up*


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**SATURDAY, JULY 14, 2018**


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8:00 – 9:00 a.m. (GP) *Sit-Down Breakfast*9:00 – 9:05 a.m. *Opening Remarks*9:05 – 10:05 a.m. **Building An Effective  
YouTube Channel**
**Tom Glatt, Jr.,** *Principal/Strategy Consultant, Glatt Consulting Group, Inc.*

Video engagement metrics prove that video is fast becoming a critical brand messaging tool—and one of the biggest platforms for video production and sharing is YouTube.

While YouTube offers credit unions a vibrant, visual means to share deep and compelling on-brand messages, most credit unions aren't taking advantage of these benefits. Why? Unfamiliarity.

In this in-depth session, Tom will walk you through the variety of YouTube video production tools and resources, and share proven, cost effective strategies for developing and leveraging well-crafted video content.

10:05 – 10:20 a.m. *Networking/Refreshment Break*10:20 – 11:20 a.m. **Digital Marketing  
& Social Media Today**
**Kevin Kelly,** *Director Of Digital And Web, Third Degree*

In a world where digital is king, is your credit union competing at the level it should? Discover a few tips from the pros, along with key analytics of spending trends, areas of focus and what your credit union is doing wrong and right.

Discover the top line strategies of using digital to your credit union's benefit and what to plan for in the coming years.

Digital tools & media ■ Member/user experience ■ Overall digital strategy

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**11:20 a.m. – 12:20 p.m. PANEL DISCUSSION**

You'll have plenty of new information to process by this point in our conference. Join members of our all-star team of presenters as they come together for a lively panel discussion involving the trends & topics we've explored over the past few days. Specifically, the panel will address questions on how to take social media from theory into everyday practice within your credit union.

*Ask Questions & Share Ideas  
During This Panel Discussion!*
12:20 – 12:30 p.m. *Conference Wrap-Up*
*Enjoy Your Free Time Exploring Boston!*



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**SUNDAY, JULY 15, 2018**


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*Travel Day – Have A Safe Trip Home!*



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**FOUR EASY WAYS TO REGISTER:**

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4. Mail registration *and* payment to:  
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 St. Louis, MO 63119

**Cancellation Policy:** If you need to cancel for any reason, you are welcome to send a substitute. Or, if you cancel in writing at least 10 business days prior to the conference date, you will receive a full refund, less a \$50 administrative fee.

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.

**Please Note:** CU Conferences reserves the right to photograph official events & sessions for exclusive use in marketing materials

**YOU CAN'T MISS US –  
 "WE'RE THE ONES IN RED"**

At CU Conferences® we have been dedicated to educating the credit union community exclusively since 1979. And we're 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.

**UPCOMING CREDIT UNION EDUCATIONAL CONFERENCE:**

**Annual Strategic Lending Conference**

▶ JULY 26 – 29, 2018 ◀  
*Harrah's Lake Tahoe*  
 LAKE TAHOE, NEVADA

FOR MORE INFORMATION VISIT:  
[www.cuconferences.com](http://www.cuconferences.com)

**CU CONFERENCES®**

**ANNUAL SOCIAL MEDIA CONFERENCE**

*What Every Credit Union Needs To Know!*

**JULY 12 – 15, 2018** ■ Renaissance Boston Waterfront Hotel ■ BOSTON, MA

Register Early For Greatest Savings!

**1ST PARTICIPANT NAME:** \_\_\_\_\_

Title \_\_\_\_\_  
 Nickname for ID Badge \_\_\_\_\_  
 Email Address \_\_\_\_\_  
 Guest Name \_\_\_\_\_  
 Guest Nickname for ID Badge \_\_\_\_\_

On Or Before MAY 10, 2018	<input type="checkbox"/> \$1045
MAY 11 Through JUNE 7, 2018	<input type="checkbox"/> \$1095
JUNE 8, 2018 And Beyond	<input type="checkbox"/> \$1145
Guest Program	<input type="checkbox"/> \$225
<b>1ST PARTICIPANT SUBTOTAL: \$ _____</b>	

**2ND PARTICIPANT NAME:** \_\_\_\_\_

Title \_\_\_\_\_  
 Nickname for ID Badge \_\_\_\_\_  
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 Guest Nickname for ID Badge \_\_\_\_\_

On Or Before MAY 10, 2018	<input type="checkbox"/> \$1045
MAY 11 Through JUNE 7, 2018	<input type="checkbox"/> \$1095
JUNE 8, 2018 And Beyond	<input type="checkbox"/> \$1145
Guest Program	<input type="checkbox"/> \$225
<b>2ND PARTICIPANT SUBTOTAL: \$ _____</b>	

Please Register Additional Participants & Guests On Separate Sheet Or For More Information Call CU Conferences: 888-465-6010

**TOTAL AMOUNT DUE: \$ \_\_\_\_\_**  
 (Based On Registration Date Selected & Optional Guest Program)

**CREDIT UNION INFORMATION:**

Credit Union Name \_\_\_\_\_ Asset Size \_\_\_\_\_  
 Contact Person \_\_\_\_\_ Contact Person's Email \_\_\_\_\_  
 Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone Number ( \_\_\_\_\_ ) \_\_\_\_\_ Fax Number ( \_\_\_\_\_ ) \_\_\_\_\_

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**HOTEL ACCOMMODATIONS: Rates As Low As \$279**



Overlooking Boston Harbor, the upscale Renaissance Boston Waterfront Hotel provides guests with unprecedented service and a wonderful blend of stylish sophistication and historic New England charm. Unwind in a state-of-the-art fitness center, indoor pool & sauna or while dining on-premises at an award-winning Italian restaurant, a nautical-themed bar or enjoying a quick bite in the café before retiring to a well-appointed, contemporary guestroom. Located in the Boston Seaport District, this luxury waterfront hotel offers easy access to Quincy Market, Faneuil Hall, upscale boutiques, restaurants, museums and more!

**Reserve Your Room Early!** Call the Renaissance Boston Waterfront Hotel at 800-228-9290. Please mention CU Conferences to receive special rates as low as \$279 or visit our special link at [www.cuconferences.com](http://www.cuconferences.com).

606 CONGRESS STREET ■ BOSTON, MASSACHUSETTS 02210 ■ 800-228-9290



- Special rates are per-night and based on availability
- Parking (rates subject to change):
  - Self-parking off-site: \$17 hourly / \$38 daily
  - Valet parking: \$48 daily

**GUEST PROGRAM (G/P): Only \$225\***

CU Conferences' Guest Program enables your registered guest to join you during Thursday's Welcome Reception, Friday's Sit-Down Breakfast and Luncheon, and Saturday's Sit-Down Breakfast.

\* Separate Fee Applies

**TRAVEL INFORMATION:**

- Boston Logan Airport (BOS) is approximately 3 miles from Renaissance Boston Waterfront Hotel. Estimated Taxi fare: \$25
- For airfare and car rental assistance call Altair Travel at 800-264-3316 (Ask For A Corporate Agent) Monday – Friday; 8:30 a.m. – 5:30 p.m. (CST) (Nominal Service Fee Applies)

