

Partnership Symposium Agenda

with Ron Shevlin serving as event host

October 1, 2008

8:00 am – 8:45 am
Foyer

Registration | Breakfast | Networking

8:45 am – 9:00 am
FORUM A

Welcome Address
Doug True

9:00 am – 10:00 am
FORUM A

Young & Free – Attracting New, Young Members

Tim McAlpine, President & Chief Strategist, Currency Marketing

We all want new members, especially those with many years of borrowing, depositing, and investing ahead of them. Tim McAlpine will share the grass-roots approach one credit union is using to engage the youth market. He'll share the process, phases, and results of Common Wealth CU's Young & Free Program, as well as provide insight into how they have solved some unforeseen issues that have come up during the campaign. Learn from Tim's experiences with the Young & Free Program how to better attract younger members to your credit union.

10:00 am – 10:15 am
Foyer

Refreshment Break

10:15 am – 11:15 am
FORUM A

Debit, Credit, & More – Remaining Relevant to Your Member's Payment Habits
Jeff Russell, The Members Group

Radical changes are taking place in the payments industry. The door is open for an entity to become the center of your members' payment and financial management world. Who will that "entity" be? Learn from Jeff about trends in financial payments and how you can best position your credit union to remain relevant in your members' payment habits.

11:15 am – 12:15 am
FORUM A

A "Clear" Choice for Members – The safis Way

Andy Mattingly, SVP Marketing & Strategy, FORUM Credit Union

Doug True, SVP Technovation, FORUM Credit Union

Like many credit unions, FORUM Credit Union faces heavy competition from banks and other financial services providers. It's not enough anymore to compete on rate or whose checking account is "free-er." To attract new members and new deposits, FORUM is introducing a new way for members to manage their money. Andy will share this patent-pending new process, how it anticipates members' payment needs, and ideas to stimulate thoughts about how to differentiate your credit union in order to meet financial goals.

12:15 pm – 1:30 pm
Foyer

Lunch

1:30 pm – 2:30 pm
FORUM A
FORUM B
FORUM C

Idea eXchange – led by participants

This time is for attendees to discuss solutions that have worked for them, present problems for others to help with, and generally collaborate with your peers. Attendees can sign up for a topic/issue they wish to present. Feel free to move between rooms. For any BarCamp veterans – you can take the lead to show others how this time can be best utilized.

2:30 pm – 3:30 pm
FORUM A

Top 5 Success Practices for Building an Online Community
Morriss Partee, Chief Experience Officer, EverythingCU.com

EverythingCU.com started in the year 2000 as an idea, and has since blossomed into an active online community of 5,863 credit union professionals, with a focus on marketing and business development. In this session, Morriss will share the top 5 success strategies that make an online community thrive (as well as be profitable). Credit unions inherently have every one of these success factors available to them, only they currently lie dormant. We'll examine how you can apply each of these practices to revitalize your CU's web presence.

3:30 pm – 4:30 pm
FORUM A

Brand Positioning: Cascade Community Credit Union
Jeff Stephens, CEO & Brand Director, Creative Brand Communications

In this in-depth case study, Jeff illustrates positioning through advanced branding tactics, why trying to be "different" is more effective than trying to be "better," and how to avoid differentiating yourself on the same attributes as everyone else.

- Or -

FORUM BC

TBD

6:00 pm – 9:00 pm
FORUM A

Dinner & Entertainment

October 2, 2008

8:00 am – 8:45 am
Foyer

Breakfast | Networking

8:45 am – 9:45 am
FORUM A

Engaging with the Social Economy
William Azaroff, Interactive Marketing & Channel Manager, Vancity Credit Union

A growing segment of the economy is being driven by social decision-making. Credit unions play a natural key role in this shift, both as community-focused organizations and as holders of significant consumer assets. This presentation will include examples of the emerging social economy, as well as a case study of ChangeEverything.ca, a social network created by Vancity which speaks to the values the largest credit union in Canada shares with the community it serves.

9:45 am – 10:45 am
FORUM A

TBD

10:45 am – 11:00 am
Foyer

Refreshment Break

11:00 am – 12:00 pm
FORUM A

Solutions to Meet Member Needs
Robbie Wright, fi-linx

fi-linx, a CUSO started by employees of the Marion and Polk Schools (MaPS) Credit Union, was launched in 2006 with the mission of creating solutions to meet the challenges the credit union was facing. Robbie, who heads fi-linx, will share the issues

his credit union has encountered, solutions created to address the issues, and how these solutions can help your credit union take advantage of opportunities and increase earned income.

12:00 pm – 1:00 pm
Foyer

Lunch

1:00 pm – 2:00 pm
FORUM A

TBD

2:00 pm – 3:00 pm
Foyer

Serving the Mobile Member

Gene Blishen, General Manager, Mount Lehman Credit Union

Still not sure how to best tackle mobile banking or looking for alternatives to enhance your current offering? Gene will share valuable member and product information his credit union has gained over the past three years, discuss various aspects of mobile banking and service options, and talk about different approaches for implementing mobile banking (do-it-yourself, vendors, partnering, etc.). Gene concludes with thoughts about “harnessing the wisdom of crowds” and the concept of innovation coming from multiple outside sources and how to ensure your credit union is receptive to these sources.

3:00 pm – 4:00 pm
FORUM A

TBD

4:00 pm

Symposium Adjourns

DRAFT