

# Elevate Bankers Virtual Experience Agenda

APRIL 21-23, 2020 | ONLINE VIA ZOOM



## FRIDAY, MARCH 27, 2020

### 10:00 - 11:30 am **MANAGING THE IMPACT OF COVID-19 FOR BANKERS**

#### **BONUS SESSION**

As the coronavirus spreads across the world, bankers must assess the risks of the pandemic and what it could mean for their institutions. From sick staff and IT systems to fluctuating financial markets and the need to maintain critical functions, banks need to consider how COVID-19 will impact each major department and business line. Because of this crisis, Elevate will provide this timely and informative bonus online session to all Virtual Experience attendees. During this session, attendees will hear from industry experts and fellow bankers from the finance, credit, technology, compliance, HR, marketing, and payments areas in a collaborative effort to discuss current challenges and strategies that every bank leader should be considering.

## TUESDAY, APRIL 21, 2020

### 9:00 - 10:15 am **UTILIZING YOUR PERSONAL BRAND TO MAKE YOUR BANK STAND OUT**

The combination of a bank employee's strong personal brand with a mission-focused bank brand can return significant results and new business relationships. Learn the proven techniques that tellers to executives use, including but not limited to social media, to differentiate themselves and their banks from the competition.

### 10:30 - 12:00 pm **VIRTUAL LOUNGE: MARKETING EMAIL MARKETING STRATEGIES THAT DRIVE ACTION**

Digital forms of communication, like email, are constantly changing to keep users informed, engaged, and entertained. Your bank's communication strategy should be doing the same. In this session, we will discuss best practices and results-driven strategies for your bank's email content. After this informative presentation, bankers will have a facilitated peer session for discussions on various strategies and best practices on bank marketing initiatives.

### 12:00 - 1:00 pm **LUNCH BREAK (TIME TO CHECK EMAILS, FEED THE KIDS, AND ENGAGE WITH YOUR TEAM)**

### 1:00 - 1:45 pm **SUCCESSFUL BANK MARKETING - BRIDGING THE GAP BETWEEN COMPLIANCE & MARKETING**

As bankers in roles of marketing and compliance will tell you, the relationship between compliance and marketing historically has been dynamic and sometimes challenging in most financial institutions. This session bridges that gap, providing tactics and perspectives on how banks can offer engaged innovative advertising and marketing campaigns, including social media, email, and print, and remain compliant.

### 2:00 - 3:30 pm **VIRTUAL LOUNGE: COMPLIANCE COMPLIANCE SOUP - FOR BANKERS FROM BANKERS**

Hear from compliance professionals, regulators, and fellow bankers on the latest compliance and regulatory issues in this collaborative, interactive session that will include peer discussions and Q&A opportunities. Topics will include fair lending, CRA, UDAP, BSA, AML, commercial lending compliance on more.

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## WEDNESDAY, APRIL 22, 2020

- 8:30 - 9:30 am** **AI FOR BANKING: WHAT, HOW, AND HOW MUCH?**  
From more efficient processes to erasing errors and cutting costs, AI-powered technologies are already disrupting traditional banking as we know it. Learn how AI (Artificial Intelligence), RPA (Robotic Process Automation), and OCR (Optical Character Recognition) / machine learning is being applied to today's banking industry. Attendees will learn specific use cases, how much can be gained from each, and how financial institutions of all sizes can get started at future-proofing their operations.
- 9:30 - 10:45 am** **VIRTUAL LOUNGE: TECHNOLOGY**  
This interactive session will feature discussions led by chief technology officers from two banks around top trends and concerns in information technology, questions on security and risk you must be prepared to answer at your board meetings, effective BCP strategies, and more.
- 11:00 - 11:30 am** **STRATEGIC IMPLICATIONS OF CECL: INTEGRATE, DEFEND, AND DON'T WIND UP OVER-RESERVED**
- 11:30 - 12:30 pm** **VIRTUAL LOUNGE: LENDING**  
**NAVIGATING COVID-19: CREDIT, CAPITAL, & CUSTOMERS**  
With the ever-changing economic and business implications due to the COVID-19 crisis, bank executives and lenders need to analyze the risks associated with their portfolios, identify concentrations, and consider ways to not only protect bank credit quality but assist valued customers in a heightened time of need. This presentation will focus on best practices and enable credit professionals to share successful tactics that they are initiating at their institution.
- 12:30 - 1:00 pm** **LUNCH BREAK (TIME TO GET A HEALTHY MEAL AND RECHARGE)**
- 1:00 - 1:45 pm** **CREATING VALUE FOR THE SMB SEGMENT THRU BETTER DIGITAL EXPERIENCES**  
Historically, the financial services industry has under-served the small and medium-sized business segment, and, as a result, the industry has under-monetized this segment with the belief that SMBs expect everything to be free. SMB owners have demonstrated through FinTech adoption that they are willing to pay for value – solutions that save them time and money and are aligned with their business needs. This discussion will focus on how financial institutions can provide better service to their SMB customers with better digital experiences that combine traditional banking with FinTech solutions, creating new value for both their SMB customers and their bank.
- 2:00 - 3:00 pm** **MODERNIZING B2B PAYMENTS WITH REAL TIME PAYMENTS**  
There are many use cases associated with executing payments faster or in real-time. Still, there are additional capabilities offered with the new RTP payment rails that can modernize the payment flows for both payers and suppliers. B2B payments represent 75% of all of the payment volume in the U.S., with 50% of the B2B volume being check. This discussion will focus on how the new RTP rails can be leveraged to solve the pain points associated with B2B payments for both small and large businesses and create an opportunity for the financial services industry to move check volume to electronic payments.
- 3:15 - 4:30 pm** **VIRTUAL LOUNGE: TREASURY MANAGEMENT & PAYMENTS**  
**PAYMENT TRENDS THAT EVERY BANK SHOULD KNOW ABOUT (WITH Q&A)**  
In the world of payments, technology is evolving rapidly – so it's essential to keep an eye on payment trends to stay ahead of the curve. Payment experts from around the country discuss regulations, fraud, payment technology changes, cross border e-commerce, and how payments will be come invisible for a seamless customer experience in the future.

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## THURSDAY, APRIL 23, 2020

8:30 - 9:15 am

### ACCOUNTING AND FINANCIAL REPORTING ISSUES UPDATE

This session will bring you up-to-date on hot topics, technical matters and current events that affect financial reporting for financial institutions. Professionals from BKD will discuss recent happenings with FASB, AICPA, SEC, PCAOB, and other relevant governance bodies. This session will also touch on recent tax changes and proposed legislation.

9:30 - 11:15 am

### VIRTUAL LOUNGE: FINANCE

#### THE DNA OF A GREAT BANK: BALANCE SHEET STRATEGIES

This two-hour interactive session will focus on your whole balance sheet by applying a disciplined approach, strategic methodology, and examining current market trends that can make a real-time impact on your bank's success. The presenter, Performance Trust, will provide attendees with critical tools and clear insights so they can make great decisions. Please Note: There will be a short presentation on important 401k fiduciary responsibilities CFOs should consider to start this session.

11:30 - 12:00 pm

### LOW RATE ENVIRONMENT STRATEGIES TO CONSIDER

With interest rates at historically low levels, hear from Elevate strategic partner IZALE Financial Group on strategies to generate noninterest/fee income for your institution. Topics will include an innovative deposit product that can boost your bank's bottom line with immediate, sustainable fee income, while providing your customers valuable benefits. If time permits, IZALE will offer a BOLI market update. Please Note: This session will include information about specific IZALE solutions.

12:00 - 12:30 pm

### LUNCH BREAK (TIME TO GET A HEALTHY MEAL AND RECHARGE)

12:30 - 1:00 pm

### THE RIPPLE EFFECT - THE IMPACT OF MENTORSHIP IN BANKING

A well-designed and managed mentoring program can solve many organizational challenges, from attracting and retaining the right staff to empowering a workforce to achieve great things; this is particularly important in a rapidly changing, technology-driven environment involving multi-generational and diverse groups of people. Hear from a bank CEO who has mentored many young bankers throughout his career and implemented innovative programs within his institution that have a significant impact.

1:00 - 2:00 pm

### VIRTUAL LOUNGE: HUMAN RESOURCES

This interactive session will feature discussions led by bankers in the human resources area around talent management, employee engagement, managing organizational, and attracting and retaining talented employees.

2:15 - 3:30 pm

### BREAKTHROUGH LEADERSHIP

**Brian Biro** America's Breakthrough Coach

Every day you seek to breakthrough with customers to generate loyalty, satisfaction, and relationships. The key to lasting success in business is breaking through with your own team members so they eagerly embrace personal responsibility, committed purpose, and leadership. They must see themselves as breakthrough leaders! And especially in times of challenge, they must focus persistently on what they can do rather than wasting time and energy on the things they don't control. This one-of-a-kind presentation ignites the energy and true leadership potential in every attendee.

