

Optimizing Channels for Superior Member Service Workshop

October 3rd, 2013

- 7:30 – 8:30 **Registration | Breakfast**
- Rob Rubin will share some tips on how to engage online prospects, gain new members, increase web traffic, ensure your website addresses non-member needs, and drive down costs with optimized e-services.
- 8:30 – 9:45 **Case Session 1: Commerce Bank**
- The case sessions introduce the concepts and frameworks needed to make the working sessions effective.
- 9:45 – 10:00 **Break**
- 10:00 – 12:00 **Member Experience Workshop 1: Defining the Member Experience**
- Participants work to define and rank the most important attributes of the member experience within a given channel at their credit union. They then map out how their own and their closest competitors' capabilities stack up in delivery of those attributes.
- 12:00 – 1:00 **Lunch**
- 1:00 – 2:15 **Case Session 2: Ikea or TD-Canada Trust**
- 2:15 – 2:30 **Break**
- 2:30 – 4:30 **Member Experience Workshop 2: Optimizing the Member Experience**
- Participants extend the work from Workshop 1 to identify systematic opportunities to optimize the member experience within the channel they chose to prioritize. The day closes with a discussion on how participants can take the lessons back to their credit union. We will focus in particular on how to apply the member experience strategy definition and optimization process repeatedly across different channels and member segments, and we will identify opportunities to leverage data from your own organization to enhance the effectiveness and impact of this process.