

big. bright. minds.

San Diego, CA | December 6-7, 2018

Agenda – Wednesday, December 5, 2018

5:30 p.m. – 7:30 p.m. Annual Member Meeting & Reception | Kimpton Palomar

Agenda – Thursday, December 6, 2018

8:30 a.m. – 12:30 p.m. Research Fuel | Parq Event Center

Filene Fellows, Huggy Rao, Sekou Bermiss, and special guest Utpal Dholakia, kick off Day 1 sharing techniques on how to grow your credit union successfully and sustainably, how to balance exploring innovation and actual execution, and how to avoid attracting the wrong talent that can break your strategy.

2:00 p.m. – 5:00 p.m. **Experiential Learning | In and Around San Diego**

It's time to *experience* the research at one of six adult field trips outside of the credit union space. Experiences include; Border Angels, Starbucks, Loqules, plus more! Take these unique perspectives and connections back to your credit union and apply them to the challenges you face with a fresh innovative mindset.

6:00 p.m. – 9:00 p.m. **Filene Merrymaking | Mission Brewery**

Feeling competitive? Join a team and test your knowledge with a Filene twist on bar trivia. We'll fuel you with food and drinks as you connect deeper with attendees at this engaging social event.

Agenda – Friday, December 7, 2018

8:30 a.m. – 12:30 p.m. Research Fuel | Parq Event Center

Day 2 starts with Filene Fellow Hope Schau and special guest Mary Gilly focusing on trends that will help you market your services based on how people make decisions. Next, we will discover what the future holds for fintech with Filene's newest Fellow, Bill Maurer. We'll top you off hearing about the latest from Filene's innovation programs and learning about i³ concepts addressing challenges ranging from natural disasters to cybersecurity and the implications for your credit union.

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Speaker Details

**Huggy Rao,
Stanford University**

Growth is about more than simply adding members or assets—it requires that you spread and scale excellence across your organization. Filene Fellow Huggy Rao, Atholl McBean Professor of Organizational Behavior and Human Resources at Stanford University, will be onsite to talk to you about practical techniques for spreading excellence and proven strategies to grow successfully and sustainably.

**Utpal Dholakia,
Rice University**

Balancing innovation and execution can be a challenge, especially in the face of fast-moving member expectations. How should credit union leaders align to member decision-making and employee engagement with long-term strategy? Utpal Dholakia is a professor of management and holds the George R. Brown Chair of Marketing at Rice University. He conducts research on consumer behavior and marketing and pricing strategy, and he will share with you the leading edge of innovations in member experience in financial services.

**Sekou Bermiss,
University of Texas**

Even the best laid strategies can fail due to lack of talent. Explore how you can leverage simple data analytics to improve how you recruit quality employees and reduce turnover. Sekou Bermiss, Filene Fellow and Associate Professor of Management at the McCombs School of Business, University of Texas at Austin, returns fresh off our research event in September to continue the story of where attraction and retention strategies are headed, and how credit unions can capitalize on the data they already have in hand.

**Hope Schau,
University of
Arizona**

Understanding consumer's financial needs is vital. Learn how to market your credit union's programs and services based on how people make financial decisions. Filene Fellow, Hope Schau, Gary M. Munsinger Chair in Entrepreneurship and Innovation at the Eller College of Management, University of Arizona, and Mary Gilly, Professor of Marketing and Senior Associate Dean at the Paul Merage School of Business, University of California, Irvine, will share trends and news ways of thinking for cutting-edge marketing professionals to be more effective and efficient with financial messaging.

**Mary Gilly,
University of
California, Irvine**

**Bill Maurer,
University of
California, Irvine**

From automation to identity verification, data science to omnichannel banking, new technology introduces uncertainties into credit unions' business models. How should you balance the risks of adopting new technology with its promises and opportunity costs? What will the future hold for fintech? Announcing our newest Filene Fellow! Bill Maurer, Dean School of Social Sciences; Professor, Anthropology, Law, and Criminology, Law and Society; Director, Institute for Money, Technology and Financial Inclusion, University of California, Irvine makes his Filene debut to talk about essential insights that must be on the minds of every forward-thinking financial services provider in our evolving technological landscape.