



The New Credit Union Experience

Take control of your strategies and operations and create the winning experience consumers seek. Join Filene Research Institute for a virtual event to raise the bar on your member experience.

DATE: April 27 - 28, 2020
11:00 AM - 2:00 PM

REGISTER: filene.org/cuexperience

DAY ONE April 28, 2020

11:00 AM	<p>Welcome</p> <p>OPENING REMARKS</p> <p><i>Mark Meyer</i></p>
11:05 AM	<p>Opening Keynote</p> <p>MEMBER EXPERIENCE & SERVICE EXCELLENCE IN CREDIT UNIONS</p> <p><i>Dennis Campbell</i></p> <p>Harvard Professor and Filene Fellow Dennis Campbell will share the findings from his 3-part Member Experience research series. He will provide a first look at his latest report which examines the impact of member experience on service excellence with insights collected from credit union CEO interviews.</p>
12:30 PM	<p>LUNCH BREAK</p>
1:00 PM	<p>Keynote</p> <p>HUMAN/DIGITAL BANKING: A NEW HOPE FOR THE 21ST CENTURY</p> <p><i>Steve Gotz</i></p> <p>Technology is rapidly transforming the banking landscape. As large banks spend billions of dollars per year on their mobile banking offerings, the rest of the industry is scrambling to keep up and find new ways to remain relevant to their customers. Umpqua Bank decided to address these issues by fundamentally reimagining the community banking experience for the 21st century. Steve Gotz will discuss his experiences working with the leadership team of Umpqua Bank to forge a bold path forward.</p>
1:30 PM	<p>Discussion</p> <p>UPDATES</p> <p><i>Taylor C. Nelms</i></p>
2:00 PM	<p>Optional Learning Workshop</p> <p>STORYTELLING IN A BUSINESS SETTING</p> <p><i>Kelsey Crouch</i></p> <p>Stories are capable of impacting an audience faster, deeper, longer, better than the facts alone, especially in business. We'll work through tools to dramatically elevate stories, so they are sticky and memorable. This highly experiential workshop allows participants to learn, collaborate, and practice new skills with immediate, real world applications.</p> <p><i>This session has a maximum capacity of 40 attendees.</i></p>

DAY TWO April 29, 2020

11:00 AM	<p>Welcome Back</p> <p>OPENING REMARKS</p> <p><i>Taylor C. Nelms</i></p>
11:05 AM	<p>Workshop</p> <p>EXECUTIVE EDUCATION WORKSHOP</p> <p><i>Dennis Campbell</i></p>
12:20 PM	<p>BREAK</p>

12:30 PM	<p>Lunch Session</p> <p>DIGITAL VALUE: REAL-WORLD EXAMPLES ON HOW TO WIN MEMBERS & DEPOSITS BY DIFFERENTIATING ON EXPERIENCE</p> <p><i>Nikhil Lakhanpal</i></p>
1:00 PM	<p>BREAK</p>
1:15 PM	<p>Closing Keynote</p> <p>STRUCTURING DIGITAL EXPERIENCES TO IMPROVE MEMBER ENGAGEMENT</p> <p><i>Michelle Shell</i></p> <p>Financial decisions create a huge amount of anxiety for many members making it difficult for them to make decisions. Michelle's research shares insights on how to address member anxiety, which can build trust and confidence in their providers and product choices.</p>
1:45 PM	<p>Closing Remarks</p> <p>WRAP UP & THANK YOU</p> <p><i>Taylor C. Nelms</i></p> <p>Next steps and how to stay engaged.</p>
2:15 PM	<p>Optional Learning Workshop</p> <p>STORYTELLING IN A BUSINESS SETTING</p> <p><i>Kelsey Crouch</i></p> <p>Stories are capable of impacting an audience faster, deeper, longer, better than the facts alone, especially in business. We'll work through tools to dramatically elevate stories, so they are sticky and memorable. This highly experiential workshop allows participants to learn, collaborate, and practice new skills with immediate, real world applications.</p> <p><i>This session has a maximum capacity of 40 attendees.</i></p>

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