

# EVOLUTION SESSIONS DECISION MAP

A step-by-step tool to help you choose the EVOLUTION SESSION most relevant to your credit union's priorities and characteristics.

START HERE ▼

What is your current strategic focus?



Regulatory Resilience

What is your approach with the regulator?



Operational Strength

Do your biggest challenges include people or process?



Revenue Growth/Sustainability

Where will you focus growth in 2014-15?



Competitive Relevance

How many options does your field of membership have for PFI?



Member Experience

How are you keeping up with your members' expectations?

Complete what is necessary, move on.

Proactive, anticipate needs.

People

Process

Membership or Lending

Non-Interest, Off-Balance Sheet Income

Lots. But, we are the obvious choice. We stand alone.

Lots. We are one of the many.

We know what our members want and we give it to them.

We evolve alongside our members' expectations.

How quickly would you like to produce results?

Immediately.

TRACK 1  
THINK FAST & LEAN

Within the Year.

TRACK 2  
THINK BIGGER

Long term.

TRACK 3  
THINK DIFFERENT

Ongoing.

TRACK 4  
THINK IMPACT

How does your CU Culture view change?

Measured change is best.

TRACK 1  
THINK FAST & LEAN

We don't need to change.

TRACK 2  
THINK BIGGER

Let's disrupt business as usual.

TRACK 3  
THINK DIFFERENT

Build on what we know works. Change what doesn't.

TRACK 4  
THINK IMPACT

How would you characterize your leadership?

Learner/Mobilizer.

TRACK 1  
THINK FAST & LEAN

Calculated/Goal-Oriented.

TRACK 2  
THINK BIGGER

Strategic Visionary.

TRACK 3  
THINK DIFFERENT

Dreamer/Risk Taker.

TRACK 4  
THINK IMPACT

# EVOLUTION SESSIONS SCHEDULE

MONDAY, MAY 19

## EVOLUTION SESSIONS KICK-OFF

Don't miss our Kick-off Session for an in-depth introduction to the conference, and the many other facets of the year-round world of THINK.

Speakers: 1:30 pm, 8th floor, Armstrong Ballroom

**Samantha Smyth-Paxson**, Vice President Marketing, CO-OP Financial Services  
**Amanda Vande Brake**, Senior Marketing Manager, CO-OP Financial Services  
**Joe Franklin**, Senior Manager, Experiential Marketing, CO-OP Financial Services

### TRACK 1 5th floor, Grand Couteau

#### THINK FAST & LEAN: Adapting to Regulations & Mastering Operational Challenges

Learn to prosper amid new legislative initiatives, emerging trends such as EMV, and operations that must integrate increasingly diverse systems.

Host: **John MacAllister**  
Principal, Dorado Industries

Schedule:

- 2:15 – 3:00 pm **John MacAllister**
- 3:00 – 3:30 pm **Michelle Thornton**,  
Manager, Core Products,  
CO-OP Financial Services
- 3:30 – 4:00 pm Break
- 4:00 – 4:45 pm **Caroline Willard**,  
Executive Vice President,  
Markets and Strategy,  
CO-OP Financial Services
- 4:45 – 5:30 pm **Sue Mitchell**, CEO, and  
**Brandi Stankovic**, Partner  
of Mitchell, Stankovic and  
Associates

### TRACK 2 8th floor, Armstrong Ballroom

#### THINK BIGGER: Exploring Opportunities for Sustainable Payments Revenue

Position your credit union to benefit from the latest payments trends by implementing solutions and programs with enduring potential.

Host: **Frank Diekmann**  
Publisher, Credit Union Journal

Schedule:

- 2:15 – 3:15 pm **Tim Kolk**, President,  
TRK Advisors
- 3:15 – 3:30 pm **Jennifer Kerry**, Vice  
President, Credit Card  
Services, CO-OP Financial  
Services, and  
**Darron Dunn**, Vice  
President,  
The Members Group
- 3:30 – 4:00 pm Break
- 4:00 – 4:45 pm **Andrew Gates**, Director  
of Strategic Partnerships,  
RewardsNOW
- 4:45 – 5:30 pm **Ondine Irving**, Owner  
and Founder,  
Card Analysis Solutions

### TRACK 3 8th floor, Salon 817

#### THINK DIFFERENT: Achieving Differentiation Beyond & Within the Industry

Respond to expanding competition with community support and empowering, convenient solutions that resonate with consumers.

Host: **Sarah Snell Cooke**  
Publisher/Editor-in-Chief,  
Credit Union Times

Schedule:

- 2:15 – 2:30 pm **Gigi Hyland**, Executive  
Director, National Credit  
Union Foundation
- 2:30 – 3:30 pm **Philips McCarty**, Principal,  
and  
**Maureen Carlson**,  
President, Good Scout  
Group, and  
**Clark Sweat**, Chief  
Corporate Partnerships  
Officer, Children's Miracle  
Network Hospitals
- 3:30 – 4:00 pm Break
- 4:00 – 4:45 pm **Rachna Ahlawat**, Founder  
and Vice President,  
Products and Customer  
Engagements,  
Ondot Systems
- 4:45 – 5:30 pm **Brian Porter**, Director of  
Business Development-  
Branch Transformation/  
Advisory Services, Diebold

### TRACK 4 8th floor, Salon 825

#### THINK IMPACT: Delivering Top Member Experiences from the Insight, Out

Leverage the power of data analytics to build loyalty and encourage profitable behavior by understanding and meeting member expectations.

Host: **Chris Kruger**  
Regional Sales Manager, CO-OP  
Financial Services

Schedule:

- 2:15 – 2:45 pm **Kevin Rowland**, Senior  
Business Leader-Strategic  
Partnerships, and  
**Christian Ensley**, Senior  
Account Manager-  
Strategic Partnerships,  
MasterCard
- 2:45 – 3:30 pm **Ron Record**, Relationship  
Manager, Saylent
- 3:30 – 4:00 pm Break
- 4:00 – 4:45 pm **Shazia Manus**, CEO,  
The Members Group
- 4:45 – 5:30 pm Panel Discussion:  
Hot Topics in Member  
Experience  
Panelists:  
**Brian Bodell**, CEO,  
Finivation  
**Heidi Young**, Director of  
Sales, RewardsNOW  
**Stephen Bohanon**,  
Founder, Chief Strategy &  
Sales Officer, Alkami  
**Shazia Manus**, CEO,  
The Members Group  
**Ron Record**, Relationship  
Manager, Saylent