LBA

Louisiana Bankers Association

2017 LBA Retail Conference

June 15, 2017

The Bankers Center, Baton Rouge

9:00am-3:15pm

Who Should Attend

Retail Managers, Retail Staff, Operations Officers, COOs, CFOs, Sr. Management

5555 Bankers Avenue, Baton Rouge, LA 70808 / Phone: (225) 387-3282 / Fax: (225) 343-3159

www.lba.org

Conference Agenda

8:45am-9:00am **Registration and Continental Breakfast**

9:00am-10:00am **Building Your Bank's Payment Strategy**
Julie Hanson, ICBA Bancard, Inc. & TCM Bank, N.A.

Payments are an important part of a bank's balance sheet, generating substantial non-interest income. But with so many emerging solutions, where do you begin? In this session, we will discuss how to develop a payments strategy and some of the emerging payments solutions that are here to stay.

10:00am-10:15am **Break**

10:15am-11:15am **Regaining Customer Intimacy: Apply Proven Customer Experience Management Practices to Build Rock-Solid Relationships with Your Highest-Priority Customers.**
Chuck Bruney, Align fsc, Inc.

Consumers and businesses are no longer steadfastly loyal to their banks. Instead, they're shopping for value and transferring larger portions of their business from one provider to another with little concern for fidelity. And, why not? They have a wider array of choices than ever before from an expanding and diverse pool of capable providers who are transforming themselves into convenient, lifestyle-oriented partners. The good news is that straightforward Customer Experience Management practices are now readily accessible to manage your customer interactions, build rock-solid relationships with your highest priority customer segments, and accelerate your banks growth and profitability. This interactive intersession will provide you with a practical approach for how you can begin designing and reacting to your customer interactions to meet or exceed their expectations and increase satisfaction, loyalty and advocacy.

11:15am-12:15pm **Embracing the Revolution: How to Attract & Retain Millennials as Bank Customers & Employees**
Jay Jenkins, ncino

There is a cosmic demographic shift happening in the U.S., driving change across industries large and small. The baby boomers are retiring, and the so-called millennials are replacing them with increasing economic and cultural muscle. This change is forcing banks to rethink outdated strategies, adjust past tactics and adapt to the reality of millennials both as customers and employees. This session will put the significance of this generational shift into concrete terms and discuss why the challenge of adapting to millennials has thus far been difficult for banks. We will then describe the most important strategic priorities for banks to begin the process for developing their own next-generation corporate cultures and digital engagement experience for the millennial customer and employee.

12:15pm-1:00pm **Lunch**

Conference Agenda (continued)

1:00pm-2:00pm **Armored Carrier Services Discussion**
Durrell Pellegrin, Loomis US
Brinks (invited)
Dunbar (invited)

This session will include a panel discussion of armored carriers. It will include a discussion of the services provided such as handling ATM servicing, currency vaults/counters, as well as best practices for working with armored carriers including contracts, expectations, etc.

2:00pm-2:15pm **Break**

2:15pm-3:15pm **Incentive Plans: Do They Work?**
Jay Toups, Retail Management Resources

Join us for a discussion on how to build ethical incentive plans that are mutually beneficial for the client, bank and banker.

Conference Speakers

Julie Hanson is the Senior Vice President of Card and Payment Products for ICBA Bancard, a subsidiary of the Independent Community Bankers of America. Julie has been assisting banks for over 20 years. Her experience includes Credit and Debit Card Issuing and Acquiring, Portfolio Management, Product and Client-Relationship Management, and Treasury Management Sales to Financial Institutions and Corporations. In Julie's current role she provides client banks with guidance for new product options, marketing and program profitability. Julie also speaks to financial institution audiences on current payment trends including mobile and digital payments, and overall industry changes in the credit and debit card landscape. Julie holds degrees in Economics and Political Science from the University of Wisconsin-Madison. In her spare time, she enjoys her family, her community and being outdoors. Julie resides with her husband and two daughters in Stoughton, Wisconsin.

Chuck Bruney is CEO of Align FSC. Chuck has nearly thirty years of experience throughout North America, Central America, Europe and Latin America assisting financial services organizations accelerate profitability and growth. Prior to founding Align, Chuck launched and directed the strategic consulting practices at BGS Group and IBT Enterprises. In those roles, he assisted bank, payment systems and credit union clients in the completion of strategic business planning and "specialty niche" market segment projects. Before IBT, Mr. Bruney was Senior Vice President of Marketing and Product Management at Vital Processing Services, a merchant acquirer credit card processing joint venture of Visa USA and TSYS, where he directed the company's re-branding, communications, and back-office support product development and product management activities. Chuck holds an M.B.A. from The Wharton School, University of Pennsylvania and a Bachelor of Science in Business Administration from Auburn University. He is a frequent contributor to industry trade publications and considered an expert speaker on business strategies for the financial services industry.

Jay Jenkins is the product manager for financial analysis products at nCino. Prior to joining nCino, Jay was the founder of Sabre Capital Group, LLC, a financial research and consulting company, an equity analyst for the Motley Fool covering regional and national bank stocks, and a credit administrator with First South Bank, a community bank in North Carolina. He's a graduate of the University of North Carolina at Chapel Hill and attended the Advanced Commercial Lending School at East Carolina University and the National Lending School at Southern Methodist University.

Jay Toups is the Principal of Retail Management Resources, Inc., a Lafayette based company. His 25+ years of experience includes time spent at First Commerce Corp, Hibernia National Bank, Bank One, and Dixie Savings as a Lender, Branch Manager, Regional Manager, Retail Sales Coordinator, etc. He is currently working with community banks across the Gulf South, helping them grow and prosper.

Retail Conference

June 15, 2017

The Bankers Center, Baton Rouge

Registration Information

Registrant 1

Mr./Mrs./Ms. _____
Bank _____
Email Address _____
Branch Street Address _____
City, State, Zip _____
Phone _____
Fax _____

Registrant 2

Mr./Mrs./Ms. _____
Bank _____
Email Address _____
Branch Street Adress _____
City, State, Zip _____
Phone _____
Fax _____

Payment Options

□ Check (Made payable to the Louisiana Bankers Association)

□ Visa □ MasterCard □ American Express

Card # _____ Expiration Date _____

Amount to be charged on card $_____

Name on Card (Please Print) _____

Billing Address _____

Signature _____

Registration Fee

$250, per LBA member
$450, per non-member

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$450, per non-member

Location

The Bankers Center, LBA Office
5555 Bankers Avenue
Baton Rouge, LA 70808
225-387-3282 (phone)

Agenda

8:45 a.m.	Registration
9:00 a.m.	Program Begins
12:15 p.m.	Lunch
3:15 p.m.	Program Adjourns

Cancellation Policy

Due to commitments we must make to secure a class, we need your help. If you must cancel your registration, please do so at least 3 business days prior to the seminar date to avoid a $125 cancellation fee. Any registrant who does not cancel will be billed the full registration fee and sent the manual. Substitutions are welcome at no additional charge.

Hotel Information

Residence Inn by Marriott - Towne Center at Cedar Lodge
7061 Commerce Circle, Baton Rouge, LA 70809
For reservations, call **(225) 925-9100** and ask for the "Louisiana Bankers Association special room rate of **$122."**

Candlewood Suites
5353 Bankers Avenue, Baton Rouge, LA 70808
For reservations, call **(225) 925-3353** and ask for the "Louisiana Bankers Association special room rate of **$89."**

Submit registration and view roster in the Education Section of LBA's Website, www.lba.org