



LEADERSHIP Unplugged

MARCH 7 - 9 | PHOENIX, AZ

New Sessions Added Daily

DIGITAL CHANNELS FORUM

Monday, March 07, 2016

2:45 PM - 3:55 PM

Location:
Grand Canyon 4-5

Building and Sustaining a Culture of Innovation

Innovation is more than just developing the hottest new mobile application. It's also about how your company delivers services to customers as it strives to grow and thrive in a competitive environment. Hear from a panel of experts who will share their best practices for hiring, training, reinforcing and sustaining an innovative culture at their organization.

Speaker(s):

Katherine McGee, SVP, Head of Digital Product Management, Wells Fargo Virtual Channels, Wells Fargo Bank, N.A.

Bernard Schramm, Enterprise Strategy Manager, FIS

Andres Wolberg-Stok, Director, Citi FinTech, Citigroup Inc.

Moderator: Andrew Hovet, Senior Vice President-Director of Delivery Channels, IBERIABANK

4:00 PM - 5:00 PM

Location:
Grand Canyon 1-3

Banks + Fintech = Solutions for an Innovative Digital Payment Future

Our panel of industry experts will discuss how customer experience, product design and digital innovation lay the groundwork for staying competitive in today's fast-paced and time-sensitive payment environment. Our panel will discuss strategies for keeping your bank at top of wallet!

Speaker(s):**Tami Eckstein**, *VP Innovation*, Optum Bank**Gene Kirby**, *Managing Partner*, CE Solutions Group, LLC**Shawn O'Brien**, *Consumer Segment Group, Executive Director*, BBVA Compass**Moderator: James Collas**, *President and Chief Executive Officer*, Engage Financial Technology

Tuesday, March 08, 2016

10:10 AM - 11:10 AM

Location:
Grand Sonoran H-I

Building New Communication Channels to Customers

Reaching out to consumers has always been a priority for the industry, but new communication channels provide an opportunity to deliver services far beyond consumers' wildest expectations. Advances in technology have led to enhanced communications between industry and their customers. Learn how companies can leverage these new advances in communications to deepen interactions with their customers.

Speaker(s):**Brian Moore**, *Senior Principal, Industry Solutions*, Nuance Communications, Inc.

11:40 AM - 12:40 PM

Location:
Grand Canyon 4-5

The Power of Customer Data: How to Realize its Potential for Marketing

Banks have enormous amounts of data on their customers, both descriptive and behavioral, online and offline but are we using this data to our best advantage? In this session, experts will discuss the challenges and strategies of putting customer data to work, and share real-world wins, for integrating and leveraging customer data into your marketing for greater response, conversion, and customer engagement.

Speaker(s):**Tony Coretto**, *Director*, Novantas, Inc.**Paul Kadin**, *Senior Advisor*, Novantas, Inc.

2:40 PM - 3:40 PM

Location:
Grand Canyon 4-5

Digital Channels Forum Roundtable Discussion

The trend lines are clear. Consumers today are asking for banking on demand, meaning access to their financial institutions all day, every day. To meet this demand, banks are building out their online and mobile offerings, but innovation

comes at a price. How do financial institutions allocate scarce resources to excite and delight their customers, while meeting the expectations of regulators? Join us for this roundtable discussion to learn from your industry peers.

4:15 PM - 5:15 PM

Location:
Grand Canyon 4-5

The Modern Lockbox: Balancing Security with Customer Experience

A perennial challenge for the industry is providing customers with simple ways to interface with their financial institutions while defending the bank from aggressive cybersecurity threats. This session will discuss current thinking on security approaches that do not hinder customer engagement. Listen as we examine industry trends and analyze the additional layers of security banks can provide.

Speaker(s):

Vic Diaz, *Cyber Security Executive*, USAA Federal Savings Bank

Shaked Vax, *Trusteer Products Strategist*, IBM Security

Moderator: Joshua Winstead, *Vice President, Digital Channel*, EverBank

Wednesday, March 09, 2016

7:50 AM - 8:50 AM

Location:
Grand Sonoran A-B

21st Century Disruptors in Lending

Between marketplace lenders, online aggregators, and other online tools, the student loan market has seen multiple attempts at disruption. This session will examine the successes and failures of organizations seeking to disrupt education finance. Panelists will review varying types of origination and servicing platforms and unique marketing strategies that help build a sense of community between lenders and their customers. Attendees will gain insights on the future of marketplace lending in the student loan market.

Speaker(s):

Stephen Dash, *Founder & CEO*, Credible

Tim DeMello, *Founder & CEO*, Gradifi

Robert Lavet, *General Counsel*, SoFi

Moderator: Michael McFarlane, *Senior Vice President*, Citizens Financial Group

9:00 AM - 10:00 AM

Location:
Grand Canyon 1-3

High Tech Branching: Sales and Service in 2016 and Beyond

Branches have been deposit gathering machines, but will this trend continue in a changing retail environment? How can banks keep up with the latest technological trends? Hear from top innovators in branch banking to better understand what retail sales and service will look like in 2016 and beyond.

Speaker(s):

Victoria Dougherty, *Director of Payment Management Solutions*, Fiserv

Jeffrey Kastelic, *Practice Advisor, Financial Services*, Cisco Systems, Inc.

Jose Resendiz, *General Manager, Digital Insight*, Digital Insight, NCR Company

Moderator: Ryan Bailey, *Executive Vice President*, TD Bank
