

Monday, April 3, 2017

2:45PM - 3:50PM

Small Business Banking

Grapevine 1-2

Small Business and Regulation: Where Are We Heading?

Discover how fair lending enforcement developments effect small business banking. Explore the past, present and future of regulations in small business and receive practical solutions for better accessing and managing risks.

Speaker(s):

Melanie Brody, *Partner*, Mayer Brown LLP

Alan Ellison, *Small Business Program Manager*, Consumer Financial Protection Bureau

Alex Stricker, *Principal*, Charles River Associates

4:00PM - 5:00PM

Small Business Banking

Grapevine 1-2

The Well is Drying Up: Revitalizing Small Business Talent

Many banks are running out of trained business bankers. Banking has not been a “hot industry of choice” for a variety of reasons. The cost of training is significant. Retaining talent is becoming more and more challenging. In this session, we will focus on two banks who address the challenge in different ways. Leave this session with strategies for building your talent pipeline and retaining and developing talent for your enterprise.

Speaker(s):

Michelle DiGangi, *Executive Vice President, Director of Small and Mid-Size Enterprise Banking*, Bank of the West

Elizabeth Dobers, *Executive Vice President, National Sales Manager*, BBVA Compass

Nick Miller, *President*, Clarity Advantage Corporation

Tuesday, April 4, 2017

9:55AM - 10:55AM

Small Business Banking

Grapevine 1-2

The Future of Small Business Delivery: Best Practices

Current changes in the marketplace have important implications for small business lines. Business transactions as a percentage of overall branch volume will continue to increase and the cost burden of the physical network will continue to shift towards business banking. This session will provide data and research insights to demonstrate the changing small business landscape, make the case for transforming the sales model and provide an approach for banks to pursue the changes required.

Speaker(s):

Cetin Duransoy, *Executive Vice President, Small Business Bank, Capital One Bank*

Robert Griffin, *Managing Director, Novantas*

Neil Hosty, *Senior Vice President, Head of Business Banking & Retail, M&T Bank*

Ann Marie Lynch, *Senior Vice President, Deposit Products Group, Wells Fargo & Company*

11:25AM - 12:25PM

Small Business Banking

Grapevine 1-2

Driving Small Business Customer Engagement in The Digital Age

Small and mid-sized businesses (SMBs) have long been a tricky segment for banks to capture and retain. The competitive landscape has truly heightened, and, to compete, banks must first understand what their SMB customers want and need, and subsequently develop digital strategies that provide the right combination of efficiency, engagement, and value. This session will explore the evolution occurring in customer engagement strategies across digital channels and help develop an understanding of what works best and where the industry is heading. ath Power's latest Digital Banking Study will provide insight into how customers are responding to current digital offerings and their changing expectations. Panelists from leading institutions will discuss digital channel strategies and how they are facing the challenges of providing meaningful and consistent experiences for their customers across multiple channels while, ultimately, driving profitability, loyalty and retention.

Speaker(s):

Frank Aloï, *President & CEO, ath Power Consulting*

Mollie Gawronski, *Head US Small Business Segment Strategy, BMO Harris Bank*

Ed O'Brien, *Executive Vice President, Research & Strategy, ath Power Consulting*

Craig Sievertsen, *Senior Vice President & Manager Business Banking & Consumer Lending, Banner Bank*

Christopher Ward, *Executive Vice President, President of Business Banking*, Citizens Financial Group

1:30PM - 2:30PM

Small Business Banking

Grapevine 1-2

Building Customer Relationships with the Evolving SMB

We often focus solely on the terms of services to gauge how to drive customer satisfaction, but today's small business customer wants more. This session will explore how banks can drive customer satisfaction while keeping customers coming back again and again.

Speaker(s):

Sara Brouillard, *Family Business Resource Center Manager*, Broadway Bank

Daniel Burrus, *Founder and CEO*, Burrus Research, Inc.

Katie Harvey, *CEO*, KGBTexas Communications

LaRhesa Moon, *Strategist*, Harland Clarke

Michael Scott, *Vice President, Strategy*, Harland Clarke

3:00PM - 4:00PM

Small Business Banking

Grapevine 1-2

Deriving Analytical Insights from Big Data to Drive Small Business Value

Traditional approaches to credit risk and marketing management can make it more difficult for banking institutions and personal lenders to sustain competitive advantage within their respective markets. More than ever, having critical business intelligence is key to staying ahead of the game. It is imperative for lenders to harness the power of data and insights to help expand their outreach to prospective small business customers, while simultaneously satisfying internal and external regulatory and compliance requirements.

This session will provide a framework for understanding how trended and alternative data, in combination with innovative analytical techniques, can be leveraged to extract valuable insights for helping to create small business value. Get the information you need to make more informed decisions.

Speaker(s):

Eric Fox, *Vice President, Leader - Consumer Banking & Lending Analytics*, Equifax

4:10PM - 5:10PM

Small Business Banking

Grapevine 1-2

State of FinTech and Small Business Banking

Marketplace lenders have evolved as a result of technology and innovation – and are disrupting traditional lending. This session will cover the current state of banks and FinTech, current banking trends, and small business lending at scale.

Speaker(s):

Jeremy Balkin, *Head of Innovation - Retail Banking & Wealth Management*, HSBC USA

Thomas Sullivan, *Vice President, Small Business Policy*, U.S. Chamber of Commerce

Charles Wendel, *President*, FIC Consulting