



2017 OPERATIONS CONFERENCE: SURVEYING THE NEXT FIVE YEARS

BANK to the future

August 24 ▪ Denver, Colorado ▪ Marriott Gateway Park

Education, preparation and collaboration for community bankers in these roles:

- Cashiers and ops managers
- Chief operating officers
- Branch managers
- CFOs
- Universal bankers or customer service reps
- Lead tellers
- Anyone involved in strategic planning or product development
- Hiring managers and trainers

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TOPICS AND TEACHING POINTS IN BRIEF

Evolution of the Payments System.

The Federal Reserve Bank’s final paper on Faster Payments was released recently. Deborah Shaw will review the content in terms of what “faster” will mean for the operations side of community banking. She’ll make some comments on what’s happening on the secure payment side and the ways in which financial institutions will continue adapting in the Same Day ACH environment. This session will be particularly helpful for those who plan for, oversee, or implement operational changes.

Vendor Management Assessment.

This session will begin with a drill-down into common questions starting with how do you manage vendors and vendor risk at your bank? Is there a vendor management framework that consistently manages third-party risks? Jim Bolyard will discuss important facets of knowing all your vendors and point out pertinent regulatory expectations to keep in mind. He’ll close by inviting questions from the audience—so bring yours!

Customer Succession Planning.

What will your customer base look like in a few years? Debbie Meyers will consider demographic data from several angles—like age distribution shifts and the flow of people from rural to non-rural areas—and introduce questions (and possibilities) the trends suggest for community banks. Also to be explored: strategies for attracting different customer subgroups, retaining sufficient deposits to fund growth, and competing with non-bank financial service providers. This material will be valuable for those involved in product development, sales, branding, service delivery, or strategic planning.

What Millennials Look for From a Financial Services Provider and Employer.

Each successive wave of younger business owners, customers and employees is influenced by common generation-specific events and environmental realities. In this session, four millennials from the business sector will talk about some of the values and goals that underlie their work and influence their choices. The discussion, facilitated by attorney Kristin Godfrey, will help participants understand, encourage, and collaborate with the incoming wave of customers and colleagues known as millennials.

Trips and Traps That Can Stall Your Career.

Every so often, even the most talented high performers can slip into ineffective behaviors in the workplace, bringing undesired results. Dave Nowling will discuss some common negative behaviors that can stall or stop careers and strategies for avoiding those pitfalls—so as to gain influence and improve the likelihood of career success. Dave’s coaching can benefit anyone interested in professional growth and fulfillment.

SCHEDULE AT A GLANCE *(subject to change/updates)*

Wednesday, August 23

1⁰⁰ to 4⁰⁰ pm **Roundtable discussion:** Conference participants are invited to discuss ideas, news, issues, predictions, and solutions related to community banking. Find out what’s working in other markets, share what you know, and ask questions you’ve been wondering about. Participation is optional; to reserve a seat, check the appropriate box on your registration form.

5⁰⁰ to 7⁰⁰ pm **Welcome reception:** Relax, socialize, and make new professional contacts over heavy appetizers and refreshments.

Thursday, August 24

7³⁰ am **Breakfast**

8³⁰ am **Evolution of the Payments System**
Presented by Deborah Shaw, Senior Technology Specialist (AAP, CTP) • Federal Deposit Insurance Corporation

9⁴⁰ am **Vendor Management**
Presented by Jim Bolyard, Senior IT and Audit Officer (CISA, CISM, CGEIT, CRISC, CRMA) • Data Center Inc.

10⁴⁵ am **Customer Succession Planning**
Presented by Debbie Meyers, Senior Consultant • Bank Strategies LLC

11⁴⁰ am **Lunch**

1⁰⁰ pm **Panel: What Millennials Look for From a Financial Services Provider and Employer**
Facilitated by Kristin Godfrey, Attorney and Shareholder • Jones & Keller
Panelists: Four business-sector people born between 1982 and 2004

2³⁰ to 3²⁰ pm **Trips and Traps That Can Stall Your Career**
Dave Nowling, Senior Vice President of Consulting • RB Slade & Associates



2017 Bank Operations Conference

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August 24 • Denver Airport Marriott at Gateway Park • Denver, Colorado

REGISTRATION INFORMATION

Participant's Name (as you want name to appear on badge and/or certificate)

Title / Job Function

Bank

Mailing Address

City, State, Zip

Phone

Fax

Email Address

CONFERENCE FEE: \$179.00 per participant includes materials and meals.

You are invited to participate in preconference activities on August 23 at no additional cost:

- Roundtable Discussion from 1:00 to 4:00 PM
- Opening Reception from 5:00 PM to 7:00 PM

Indicate which events you plan to attend:

Preconference Roundtable (August 23)

Opening Reception (August 23).

Bringing a guest to the Reception?

Yes

No

PAYMENT METHOD:

Invoice me

Check (payable to Bankers' Bank of the West)

Debit my bank's account with BBW

I authorize Bankers' Bank of the West to debit my bank's DDA.

Contact Name and Phone Number:

Authorizing Signature (if debit):

How to return your registration:

Email: conferences@bbwest.com

Fax: (303) 291-3714

Mail: Bankers' Bank of the West | ATTN: Conferences | 1099 18th St, Ste. 2700 | Denver, CO 80202

Check here if you have special needs or dietary restrictions that might affect your participation. We will contact you to discuss.

Attendee substitutions can be accommodated at any time. However, refunds for cancellations will not be issued after August 14, 2017.

HOTEL RESERVATION: \$189/night. Reserve by August 11 for the special group rate.

For Marriott Gateway Park reservations, call 1-800-228-9290 or [online](#) with group name "Bankers' Bank of the West" by August 11.

http://www.marriott.com/meeting-event-hotels/group-corporate-travel/groupCorp.mi?resLinkData=Bankers%20Bank%20of%20the%20West%20Operations%20Conference%20%5Edengp%60BBWBBWA%60189%60USD%60false%602%608/20/17%608/27/17%608/2/17&app=resvlink&stop_mobi=yes

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