

ALABAMA BANKERS ASSOCIATION

BANK OPERATIONS AND MANAGEMENT SUMMIT

FEBRUARY 5-6
EMBASSY SUITES
HOOVER

2014

AND
TRADE
SHOW

SUPERVISORS
MARKETING & PUBLIC RELATIONS
OPERATIONS
INFORMATION TECHNOLOGY
HUMAN RESOURCES

GENERAL SESSION SPEAKERS

FEBRUARY 5
PUSHING THE
LIMITS ON
WHAT YOU
KNOW AND DO
Juli Lynch



"We hadn't slept in 32 hours because we wanted to get through the first canoe section in daylight. The first time we slept it was on the banks of a crocodile-infested river. We were soaking wet, the temperature was just above freezing and we were almost out of food." When was the last time you did something that really scared you? To be successful today, you have to be willing to push yourself and your organization to the limits. Learn how Lynch's training and experience in the Navy SEALs expedition-length endurance races can be applied to your organization. Learn how to push your organization to increase sales, improve service and boost performance while keeping motivation and commitment high.

FEBRUARY 5
NAVIGATING
THE FUTURE:
PREPARING
YOUR BANK
FOR THE NEXT DECADE
Trent Fleming



While the day-to-day pressures of managing balance sheets and regulatory requirements seem overwhelming, smart banks sense that the weight of competitive pressures make it even more important to develop and execute on strategies that will ensure their banks' success going forward. This session will look at emerging trends in banking products and services, and provide keen insight into developing the infrastructure, tools, and staff needed to deliver them successfully.

FEBRUARY 6
THINK LIKE A
ROCK STAR:
HOW TO TURN
CUSTOMERS
INTO FANS
Mack Collier



Rock stars can teach us a lot about how to interact with fans and communities. With case studies from both the music industry and business examples, this session will teach you:

- The four key things that rock stars do to create fans and how you can do the same with your social media efforts;
- The keys to building a vibrant community around your social media efforts;
- The importance of 'fishing where the fish are' when you're trying to build awareness of your content and brand; and,
- How to create content that taps into the 'Bigger Idea' that's more relevant and exciting to your customers.

2.5.2014

SUMMIT AGENDA WEDNESDAY

8 - 8:45 a.m. Registration and Continental Breakfast in Trade Show Area

8:45 - 9:50 a.m. Opening General Session - **Pushing the Limits on What You Know and Do, Juli Lynch**

9:50 - 10:05 a.m. Break in Trade Show Area

10:05 - 10:55 a.m. BREAKOUT SESSIONS

Top 10 Background Check Mistakes

Alan Kinsey

More than 90 percent of employers conduct some form of pre-employment background check when hiring new employees. But there are many misconceptions about background check information, process, and regulations. As a consequence, many employers conduct a background check that is inadequate, non-compliant, and in some cases, illegal. Learn the 10 most common mistakes employers make when conducting a pre-employment background check. These mistakes expose organizations to the risk of regulatory violations, ineffective hiring decisions, a poor work environment, higher employee turnover, and in extreme cases, litigation.

Weighing Technology ROI for a Profitable Future

Tim Lerew

This session takes a dynamic approach to a variety of technologies that are transforming the profitability and delivery of banking products and services. Work through an interactive ROI spreadsheet tool for evaluating both assisted and automated loan originations at your bank. Experience first hand the new technology products that aim to compete directly with your bank's delivery channels, pushing banks to re-examine the ROI of their channel strategies. Learn the "must have" technology capabilities your bank must have to remain relevant to your customers' changing preferences and needs.

Using Your Customer Insights to Produce Bottom Line Results

Michael Bartoo

We all know knowledge is power. Today, you have a tremendous amount of customer information available to you. Having it and actually using it for results, however, are two completely different things. Join us as we review your most valuable customer information and the insights you can gather from it. Learn how to leverage the information to identify growth and development activities that represent the highest and best use of your time and money. Understand your ideal client and how that insight can produce significant results.

11 a.m. - 12 p.m. General Session - **Navigating Your Future: Preparing Your Bank for the Next Decade, Trent Fleming**

12 - 1:10 p.m. Lunch in the Trade Show Area

1:15 - 2:10 p.m. BREAKOUT SESSIONS

Creating a Coaching Culture for Bottom-Line Results

Juli Lynch

Coaching and mentoring are buzz words in the realm of leadership training. Unfortunately many efforts to initiate these programs have gotten lost due to the time constraints of day-to-day business. What if you developed a "coaching culture" so that coaching/mentoring became part of the very fabric of who you are? Learn strategies for incorporating coaching/mentoring into your everyday life. From hiring practices to performance reviews to succession planning to relationships with vendors and customers - a "coaching culture" will consider the potential of each staff person by examining their perceived potential, realistic potential, and transformational potential.

Managing Your Core Vendor Relationships

Trent Fleming

Your contract for services with your primary banking software provider defines a very important third party relationship with your bank. Issues of exposure, liability, service levels, and cost, are all in play. Many banks have signed lengthy contracts without careful review. Sometimes the bank's attorney has reviewed and commented on the contract, but absent specific software expertise, such a review is cursory at best. This session will guide CFOs, COOs, and others with responsibility for negotiating such contracts, through a discussion of key contract points. This session is not a legal review, but an operational one, of the implications of committing to selected aspects of the contract.

Producing ROI from your Sales and Marketing Efforts

Michael Bartoo

There are three simple strategies you can deploy tomorrow to produce profitable results for your bank. In sales and marketing, we're going to talk about retention, organic growth, and acquisition. One of the biggest challenges those in sales and marketing face is proving the positive results of their efforts. Come learn how these three very simple strategies will enable you to turn marketing from an expense (as viewed by most banks) to a true investment. Now you can clearly document a positive return on investment - the measurement that your CEO and CFO want to see.

2:15 - 3:15 p.m. BREAKOUT SESSIONS

Non-Executive Compensation Related Concerns

Mike Blanchard

This session will address pay equity regulations, setting job grades, and determining base salary and appropriate raises for employees. Participants will receive information on conducting market research using industry survey data, using the market research to establish and set salary grades by position, and linking salary increases to positioning in a salary grade range and performance.

2014 IT Compliance Tips, Tricks and Trends: Regulator Hot Buttons, Audit & Examinations

Tom Hinkel

Hinkel will discuss the most current regulatory hot buttons, audit and examination trends, and lessons learned from the most recent IT audits and examinations.

Best Practices in Electronic Marketing

Tim Lerew

Most banks have the tools at hand for successful electronic marketing. But few are the banks that have most successfully integrated those and related electronic tools for truly effective, profitable, customer marketing. Join us as we look at best practices from financial institutions from across the country, as well as provide some relatively straight forward, low cost approaches you can readily apply at your bank.

3:15 - 5p.m.

TRADE SHOW SPEED DATING SHOWCASE - RECEIVE A FREE PAIR OF MAUI JIM SUNGLASSES

Conference attendees are invited to join us for this new event where each bank attendee will spend a few minutes with a participating vendor to hear about their products and services.

SUMMIT AGENDA THURSDAY

2.6.2014

8 - 8:30 a.m. Continental Breakfast in Trade Show Area

8:30 - 9:30 a.m. General Session - Think Like a Rock Star How to Turn Customers into Fans, Mack Collier

9:30 - 9:45 a.m. Break in Trade Show Area

9:50 - 10:45 a.m. BREAKOUT SESSIONS

HR & Supervisory Current Concerns and Solutions

Kimberly Pruitt

This breakout session will cover current concerns for all levels of management when dealing with human capital. Learn about managing human capital by studying topics such as employee policies and procedures, employee evaluations, investigations, disciplinary action, recruiting, on boarding, and off boarding. Concerns and solutions will be addressed.

Technology and Banking: The Good, Bad and the Ugly

Tom Hinkel

Join Hinkel as he discusses the latest technology trends in banking and what management must do to avoid strategic and operational risk. Trends discussed include:

- Virtualization
- Cloud Computing
- Social Media
- Mobile Banking
- Employee BYOD (Bring Your Own Device)

Let's Get Digital: Building a Digital Signage and Marketing Platform

Josh Mabus

An assortment of electronic signs, banners, billboards, digital displays, TVs, ATM screens, mobile, and other mediums of digital marketing can be used by any size bank to keep pace with customer expectations in large markets or wow your market in smaller towns. But how do you select the best digital options and roll out an effective program? This session delivers a straightforward give-and-take discussion on specific tactics, advice, implementation plans, and results.

10:50 - 11:50 a.m. PEER GROUP FORUMS

HR & Supervisors

Facilitated by Kimberly Pruitt

Information Technology

Facilitated by Tom Hinkel

Marketing

Facilitated by Mark Faircloth

11:50 a.m. - 1:10 p.m. Lunch in Trade Show Area

1:15 - 2:10 p.m. BREAKOUT SESSIONS

Insurance Reform

Thomas Yearian

This presentation will include an important update on current issues with healthcare exchanges and new laws for 2014 and 2015. Also a discussion of how the exchanges are operating plus the individual mandate penalties. The 2015 employer mandates and penalties ending non-discrimination rules will be reviewed.

IT Disasters, Are You Ready to Lose Everything?

Nic Cofield

Disaster recovery includes every single aspect of an organization, including your IT infrastructure. Chances are your organization cannot survive without IT resources including even basic email. This presentation will outline all the IT resources you think are important, as well as those you are forgetting which may be essential to your operation. It will cover the numerous methods to ensure your data and operation are secure in the face of disaster.

Branding Basics: Beyond the Buzzword

Mark Faircloth

As competition for customer relationships continues to intensify, "branding" and "brand" have entered the vocabulary of bank marketers. This session gets to the heart of what "branding" is and how banks can use this concept in approaching their markets. We will discuss knowing what your bank's brand already is. How to assess its current strengths and weaknesses (are you really different?). And finally, we will explore step-by-step actions to take in improving/changing your bank's brand.

2:15 - 3:15 p.m. LEGAL PANELS

HUMAN RESOURCES, INFORMATION TECHNOLOGY AND MARKETING

Attend one of our legal panels for a discussion and question and answer time to discuss pertinent issues. Each panel will be facilitated by an attorney with an expertise in that area.

3:15 - 4:15 p.m. Fittings for Maui Jim sunglasses for bankers who participated in the Trade Show Speed Dating Showcase.

ACCOMMODATIONS - EMBASSY SUITES HOOVER

Rooms are available for \$140 per night and may be reserved by calling the Embassy Suites Hoover at (800) Embassy. Please reference the Alabama Bankers Association. Room block deadline is Jan. 22, 2014. The address of the hotel is 2960 John Hawkins Pkwy, Hoover, AL 35244.

AGENDA AT-A-GLANCE

Conference Qualifies for 11.5 CPE Credits

Wednesday, February 5

- 8 - 8:45 a.m. Registration and Continental Breakfast in Trade Show Area
- 8:45 - 9:50 a.m. Opening General Session
- 9:50 - 10:05 a.m. Break in Trade Show Area
- 10:05 - 10:55 a.m. Breakout Sessions
- 11 a.m. - 12 p.m. General Session
- 12 - 1:10 p.m. Lunch in the Trade Show Area
- 1:15 - 2:10 p.m. Breakout Sessions
- 2:15 - 3:15 p.m. Breakout Sessions
- 3:15 - 5 p.m. Trade Show Speed Dating Showcase and refreshments

Thursday, February 6

- 8 - 8:30 a.m. Continental Breakfast in Trade Show Area
- 8:30 - 9:30 a.m. General Session
- 9:30 - 9:45 a.m. Break in Trade Show Area
- 9:50 - 10:45 a.m. Breakout Sessions
- 10:50 - 11:50 a.m. Peer Group Forums
- 11:50 - 1:10 p.m. Lunch in the Trade Show Area
- 1:15 - 2:10 p.m. Breakout Sessions
- 2:15 - 3:15 p.m. Legal Panels
- 3:15 - 4:15 p.m. Maui Jim sunglasses fittings (only applies to bankers who participated in the Trade Show Speed Dating Showcase)

REGISTRATION ABA Bank Operations and Management Summit

Please return the form and payment to: ABA, P.O. Box 241166, Montgomery, AL 36124; fax: (334) 244-9382; email lgarrett@alabamabankers.com.

REGISTER NOW AND SAVE! A full conference registration includes: continental breakfast and lunch on both days, breaks during the business sessions, and all seminar materials. Trade Show Speed Dating Showcase participants will receive a free pair of Maui Jim sunglasses.

EARLY BIRD MEMBER RATE (by Dec. 20, 2013) is \$395 for the first attendee, \$245 for additional attendees

REGULAR MEMBER RATE (after Dec. 20, 2013) is \$445 for the first attendee, \$275 for additional attendees

NON MEMBER RATE is \$645 for the first attendee, \$475 for additional attendees

Name	Bank	Title	Department
Address	City, State & Zip	Phone	Email
Additional Attendees:	Name	Title	Email
	Name	Title	Email
	Name	Title	Email

PAYMENT METHOD • Total fees due: \$ _____

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CANCELLATION POLICY • ABA will refund up to five business days prior to the conference minus a \$100 cancellation fee. On or after Jan. 29, 2014 no fees will be refunded but substitutions are welcome!

QUESTIONS • Call us at (334) 244-9456. Visit us on the Internet at www.alabamabankers.com.

TRADE SHOW "SPEED DATING" SHOWCASE

ABA is putting its own twist on the speed dating concept by offering a new event called the **Trade Show "Speed Dating" Showcase**. Join us on **Wednesday afternoon** during the summit to spend some time meeting with a limited number of trade show vendors who chose to participate in this event. This is a great way to hear a two to three minute presentation from each vendor while you enjoy refreshments in a relaxed setting.

As a thank you for participating in this event, each banker who comes will receive a free pair of Maui Jim sunglasses (a \$200 value)!



Men and women's styles are available. Each banker participating in the event will receive a ticket to redeem their sunglasses at the fitting to be held Thursday, Feb. 6 from 3:15 - 4:15 p.m.

Also, during this event drawings will be held for the following great prizes!

**iPad Mini • Nintendo Wii • Kindle
Coach Accessories • Jewelry
Apple TV • Electronics • and more!**

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**Speed dating participants*

ALABAMA BANKERS ASSOCIATION

BANK OPERATIONS AND MANAGEMENT SUMMIT AND TRADE SHOW

FEBRUARY 5-6
EMBASSY SUITES
HOOVER

2014

SUPERVISORS
MARKETING & PUBLIC RELATIONS
OPERATIONS
INFORMATION TECHNOLOGY
HUMAN RESOURCES



ALABAMA BANKERS ASSOCIATION
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