



2021 MANAGEMENT ROUNDTABLE

SEPTEMBER 28 · SAMOSET RESORT



Maine Credit Union League

TUESDAY, SEPTEMBER 28

All Roundtable Sessions will be live streamed for those who want to attend virtually.

7:30 – 9:00 AM **CONTINENTAL BREAKFAST**

9:00 – 10:00 AM **IS YOUR CREDIT UNION READY FOR A CHANNEL-LESS FUTURE?**

This past year is widely seen as the time when everyone's lives got at least a little more digital. Closed doors and shelter-at-home mandates radically accelerated adoption and those who hadn't gone digital yet had no choice but to dive in. But a recent survey from Forrester found that consumers didn't give digital solutions good ratings across the board. Credit unions now have an opportunity and an obligation to create a seamless experience between digital and the rest of your channels. This session will outline important considerations for building a robust, channel-less experience for your members.

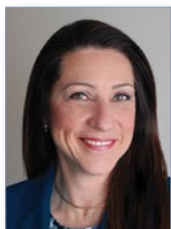


Speaker: Jeffrey Dillon, VP Digital Consumer Experience, CUNA Mutual Group

Jeffrey Dillon leads the Digital Consumer Experience group that is responsible for building the digital aspects of CUNA Mutual Group's Direct-to-Consumer business. This program focuses on identifying viable digital media tactics to reach consumers, the content to engage them, and developing the digital platforms that will serve our sales, servicing, and analytical needs. Jeffrey joined CUNA Mutual Group in February of 2018 after spending 15 years with Capital One and HSBC focused on digital media, online experiences, and digital analytics for a wide range of financial products. Over that time, he developed digital solutions for financial products ranging from retail banking to mortgages, pre-paid to credit cards, and small business to commercial banking for consumers across the income spectrum including the unbanked, non-prime, prime, and high net worth.

10:15 – 11:45 AM **CREATING THE RIGHT ENTERPRISE RISK MANAGEMENT (ERM) PROGRAM FOR YOUR CU**

Credit Unions need to have processes, policies, and procedures in place in order to assess and manage the risks on their balance sheet. In this session, Marcia will share the fundamental pieces of the ERM puzzle, how they relate to each other, and how to integrate your ERM program into the credit union's Strategic Plan. Topics will also include the specific building blocks/components of a simple yet complete ERM program and the three key areas of ERM: Identifying and Assessing Risk, Mitigating and Eliminating Risk and Monitoring and Reporting Risk. Your team can work together with the common goal of protecting the credit union's assets while fulfilling your credit union's vision.



Speaker: Marcia Malzahn, President & Founder, Malzahn Strategic

Marcia (Marcie) Malzahn is a wife, mother, author of five books and a successful executive and entrepreneur. She is president and founder of Malzahn Strategic, a management consulting practice that works with community banks and other financial institutions needing strategic planning, enterprise risk management, and talent management expertise and support. Marcia's mission is to help others in the workplace be successful in every area of their lives. For the past 20 years she has been inspiring CEO's, entrepreneurs, educators, governments and leaders on how to discover their strengths, the strengths of those they lead and combine those strengths into world-class teams, increasing productivity and reducing employee stress and costs.

NOON – 1:00 PM LUNCH

1:00 – 2:30 PM ROUNDTABLE DISCUSSION/LEAGUE UPDATE

League President Todd Mason will begin this discussion by highlighting issues impacting Maine credit unions today including a review of the recent compensation survey. The League Senior Leadership Team will then join Todd for a Q & A session.

2:30 – 3:30 PM WHAT WE HAVE LEARNED ABOUT THE FUTURE OF LENDING AT YOUR CREDIT UNION

In this session we will discuss the challenges and early lessons learned from the COVID-19 pandemic including the current challenges facing credit unions and strategic implications for your credit union. This session will provide a proven pathway forward for your credit union to navigate the road ahead. Topics will include the current state of consumer lending, the shift in consumer behavior and confidence, a case study: Red Rocks Credit Union (Littleton, CO), remote delivery, and the lending model that will have your ROAA.



Speaker: Jessica Vartanian, Senior Consultant, CU Lending Advice

Jessica began working with credit unions almost a decade ago after spending the first part of her career managing retail branches in the 'big bank' space and working in public education. In 2012, she joined Red Rocks Credit Union in Highlands Ranch, CO. At RRCU, Jessica progressively moved through various roles leading the Sales Teams, Contact Center, Business Development, and Information Technology. She led the Sales Team to organization-high loan growth, successfully established in-depth referral programs, and spearheaded numerous enterprise systems conversions-driving organizational efficiency. Her ability to marry technology and process automation enabled her to develop strategies that equip credit unions with the technology and process automation needed to thrive while training and empowering teams for exceptional member experience and sales/lending acumen.

Thank you to our corporate sponsors



PRICING

The cost for the Management Roundtable program is \$209 per person; \$139 for credit unions with less than \$50M in assets; or \$409 for League Associate Members. This price includes continental breakfast, lunch and breaks. **Refunds for the Management Roundtable cannot be issued after September 20, 2021.**

REGISTRATION

Please register online for the Management Roundtable Conference by September 20, 2021.

**REGISTER
ONLINE**

OVERNIGHT ACCOMMODATIONS

To make room reservations for the Management Roundtable, please use this link [Synergent Conferences](#) or call directly 800.341.1650 and mention Synergent Conferences. A block of rooms is available for Monday evening, September 27, at room rates of \$222 and \$247 per room.

Conference room rates apply through **September 3, 2021**. Reservations made after the September 3 will be based on availability and may also be subject to the prevailing hotel room rates.

Please contact MemberServices@mainecul.org with any questions.

