VisiFI Customer Conference 2023

Schedule

Tuesday, June 20, 2023

Time	Session
7:45 AM	**Golf -** Optional Golf Outing
12:00 PM	**Check-In -** Hotel Lobby
2:00 PM - 4:30 PM	**Informal Gathering -** Meet The VisiFI Team - Lobby Bar
5:30 PM - 7:00 PM	**Reception -** Cocktails/Opening Activity - Courtyard
7:00 PM - 10:00 PM	**Dinner -** Keynote Speaker, The Honorable Rodney E. Hood - Courtyard

INNOVATION DESTINATION
VISIFI CUSTOMER CONFERENCE 2023
JUNE 20-23 | CHARLESTON, SC

Wednesday, June 21, 2023

Time	Session
8:00 AM - 8:45 AM	Breakfast - Crystal Promenade
8:45 AM	Welcome, VisiFI Overview - Crystal DEF
9:10 AM - 12:30 PM (Includes Break 10:30 AM - 10:45 AM)	**What is Behavioral Science & How Can I Implement It?** Want to learn more about how your members think? Want to know how to reach new members and strengthen the relationship you have with existing members? Want to know how to increase morale among your staff? With Behavioral Science, you can learn the fundamentals of the subconscious mind and learn tactics and techniques you can implement immediately. In this immersive, hands-on workshop hosted by the Common Cents Lab at Duke University, you will gain a foundational understanding of Behavioral Science and learn how to incorporate research-based behavior change principles into your existing products and services. You will leave the workshop equipped with an actional plan for when you get back to the office for your staff and your members! - Crystal DEF
12:30 PM - 1:45 PM	Working Lunch - Group Activity with Common Cents Lab - Cystal DEF
1:45 PM - 2:15 PM	**Innovation in Practice - Panel on Automatic Savings Program** Learn how VisiFI, Inclusiv and Guadalupe Credit Union used Behavioral Science Principals and Digital Banking to help their members learn to save for a rainy day. This strategy strengthened their member relationships while also assisting with acquiring new members. - Crystal DEF
2:15 PM - 3:00 PM	**How to Reach Gen Z and Millennials** CEO of Glide, (formerly Burst,) Gautam Ajjarapu, will share ways to reach new members using techniques of Behavioral Science and how to think differently in the current market. *(15 min incorporation of behavioral science concept.)* - Crsytal DEF
3:00 PM - 3:20 PM	Refreshment Break with Vendors - Crystal Promenade
3:20 PM - 4:35 PM	**How the Unicorns & Dragons Do It...and, How Does That Make You Feel?** Join Jami Jennings as she shares the Digital Branch Solution Suite and how VisiFI is utilizing Behavioral Science to change the way we do banking. Hear from SavvyMoney, top Fintech company, to learn more about how Unicorns speak the member's language in the digital world. - Crystal DEF
4:35 PM - 5:05 PM	**Member Journey & Engagement** Learn more from Digital Experience Manager, Nadine Hohnke, Diamond Award Winner 2023 at Public Service Credit Union, as she shares how their CU is engaging with members. - Crystal DEF
5:05 PM - 5:10 PM	End of Day Wrap-Up - Crystal DEF
6:00 PM	Off-site Dinner

Thursday, June 22, 2023

Time	Session
8:00 AM - 9:00 AM	Breakfast - Crystal Promenade
9:00 AM - 11 :00 AM	**Product Evolution through Behavioral Science** Sneak Peak of what is to come with our overall product solution design and workflow. **Product Innovation & Roadmap** Join VisiFI product team members as they take us through the Product Innovation Roadmap and Deliverables within the last 12 months. Deep dive into various product lines including Direction/Roadmaps, *UI/UX Redesign Sneak Peak, Accounting/Back Office – 5300 Relaunch, Investments Module Overview, In-House Credit Card Overview, Core highlights to take advantage of, Lending Center enhancements* - Crystal DEF
11:00 AM - 11:20 AM	Refreshment Break with Vendors - Crystal Promenade
11:20 AM - 12:00 PM	**Data Analytics** Join Dan Urscheler and Stefano Moretti as they share data innovation and delivery within the last year. Learn more about the Data Warehouse project, Dashboards and Reporting, and more. Review the roadmap and open forum to share ideas! - Crystal DEF
12:00 PM - 1:00 PM	Lunch - Crystal Promenade
1:00 PM - 1:30 PM	**Outside The Box – Payment Systems** Join Dan Urscheler and CEO and co-founder of Felix, Manuel Godoy, as they think "outside of the box" for members wanting to send and receive money across the Mexico border. - Crystal DEF
1:30 PM - 2:15 PM	**Niche Markets with Purpose** Join AACUC, Inclusiv and Marshall Boutwell, President/CEO of Peach State FCU as they talk more about their strategy regarding the underserved/underbanked market and things they are focused on in 2023. - Crystal DEF
2:15 PM - 2:35 PM	Refreshment Break with Vendors - Crystal Promenade
2:35 PM - 3:05 PM	Breakout Session (A/B) – **Credit Union Roundtable** Meet with peer credit unions to share strategies that work, opportunities for growth, and more. - Crystal A/B, C
3:05 PM - 3:35 PM	Breakout Session (C/D) – **Digital Account Opening or Overdrafting/Courtesy Pay & Fees** - Crystal A/B, C

Attendees - Dinner/Night On Own

Friday, June 23, 2023

Time	Session
8:00 AM - 9:00 AM	CEO Roundtable Breakfast - Yellow Topaz
8:00 AM - 9:00 AM	Breakfast - Crystal Promenade
9:00 AM - 9:45 AM	**BlockAdvocates™ Crypto 101 with Becky Reed, CEO of Lone Star Credit Union** In this educational session, Becky will take you through Crypto 101. What is a Blockchain? What are the different types of Cryptocurrencies? What is a crypto wallet and key? Is this just a passing fad or are there real use cases credit unions should be considering? Bring your notepads and your questions! - Crystal DEF
9:45 AM - 10:30 AM	**Compliance** Want to know what's coming down the compliance pipeline? Join Brian Lauer and Kerri Donald, Peach State FCU's Executive Director of Risk Management, to review the landscape and what to do to prepare. - Crystal DEF
10:30 AM - 10:50 AM	Refreshment Break - Crystal Promenade
10:50 AM - 11:20 AM	**Security** – Join Roberto Endrizzi and Brian Lauer as they dive into security. Learn about high profile hacks, data breaches, and how VisiFI is keeping our customers safe. Understand strategies and tips of things you can implement at your credit union and in your member interactions to help educate members to be more security conscious. - Crystal DEF
11:20 AM - 11:45 AM	**Closing Session** - Crystal DEF