

P.I.V.O.T. 2020

THE ONE WHERE LCUL WENT VIRTUAL...



JOIN US AUGUST 7 FOR OUR LINEUP OF THESE DYNAMIC SPEAKERS AND SESSIONS



GENE MARKS

is a noted columnist, author, and small business owner. Gene writes daily on business, politics and public policy for the Washington Post and regularly for five publications including Forbes & Fox Business. He is also a Certified Public Accountant who has written five books on business management. Additionally, he's appeared on national news programs discussing matters affecting the business community.

AUTHOR. COLUMNIST. KEYNOTE SPEAKER. SMALL BUSINESS EXPERT.



RAVEN SOLOMON

is a national speaker, author & Multigenerational Leadership Expert. Her objective in delivering her message is to break down generational barriers and complexities in the workplace. Her processes create synergy across generations that foster productive working relationships, drive business results and enhance inclusive community culture.

MULTIGENERATIONAL LEADERSHIP EXPERT. AUTHOR. KEYNOTE SPEAKER.



CELESTE COOK

is a credit union industry strategist, consultant and trainer who as CEO of cuStrategies LLC, has served the industry for more than 20 years. She brings proven strategies which have brought her credit union clients measurable increased growth in membership, loans and profitability. In addition to a business management degree, she also holds Certification in Sales Leadership Strategies through CUNA.

SPEAKER. CONSULTANT. TRAINER. STRATEGIC PARTNER FOR GROWTH.



KEVIN SMITH

is a Consultant and Publisher with TEAMResources specializing in strategic planning, board governance and oversight. He is co-author of A Credit Union Guide to Strategic Governance. Prior to joining TEAMResources he spent ten years at CUNA in the Center for Professional Development and was instrumental in developing forward thinking programs including an IDEO design program.

AUTHOR. EXPERT IN STRATEGIC GOVERNANCE FOR CREDIT UNION VOLUNTEERS.



OPENING KEYNOTE

Beyond 2020: Political, Economic, & Tech Trends Affecting the Next Few Years, **Gene Marks**

The most successful business executives and leaders have one thing in common - they are always looking ahead while executing plans for the current year. There are certain areas where you should be directing your focus. Are you prepared to navigate through economic downturns? Are you taking the potential outcome of the 2020 elections into account and the impact that outcome will have on the industry? Are you monitoring what investments you should be making? Are you keeping abreast of what technologies you should be considering? Gene Marks will touch on all these significant factors and the actions you should take in this thought provoking, forward-thinking keynote.



CLOSING KEYNOTE

Exploring the Intersection of Generational Diversity & Social Responsibility, **Raven Solomon**

Cooperation is at the core of who we are - across differences of all kinds, including race, ethnicity, gender, religion, ability, sexual orientation, and generation. These differences impact the way we experience the world, what we understand to be normal, how we show up at work, and how we view social responsibility. This keynote presentation will help us understand the unique differences we have across generations and how those differences impact the way we view social responsibility. Participants will learn how people of different generations are processing the current events of our world and why they might be responding the way they are. Attendees will be left with ideas and next steps to better cooperate across generations in order to create inclusive, equitable environments that contribute to the development and evolution of our communities.

BREAKOUT SESSIONS

Leading and Managing Change, **Celeste Cook**

Credit unions must find ways to lead and manage change to navigate disruptions more efficiently. To be successful we must be quick and nimble in our responsiveness to the ever-changing environment both internally and externally. This session will utilize a big picture approach where Celeste Cook will identify obstacles that impede the change process and share strategies to overcome the bottlenecks and barriers to change. Participants will explore key strategies and determine how to get buy-in for transformational change.

Evolution of Board Governance: Embracing Digital Thinking, **Kevin Smith**

Everything has changed and there's no going "back to normal". Your members, branches and even board meetings have gone digital. But, has the board's thinking and its governance approach to strategy transformed? Kevin Smith will help you embrace and use the recent challenges to pivot, and slingshot board governance thinking to a new level. This session will address digital board meetings; how new member experience models impact the staff; rethinking community presence beyond branches; re-framing digital governance as a continual flow instead of a start/stop process from meeting to meeting; plus the impacts on board turnover and succession.

Getting More Strategic About Loan Growth, **Celeste Cook**

What can credit union leaders do to build a solid, sustainable strategic plan to maximize loan growth and profitability in an uncertain economic landscape? We must find ways to become more innovative and relevant for loan growth by being responsive to member needs. Celeste will reveal the seven Ps that impact loan growth and profitability. You will discover ways to create win/win/win solutions to help capture new members and new money – particularly those of the 20 & 30 year old demographic. You'll explore key strategies to gain more profitable quality loans and to proactively prevent loan loss.

Understanding Successful Credit Union Business Models, **Kevin Smith**

As credit unions evolve, peer comparisons become more and more irrelevant. Why? Because evolution is leading to the development of many credit union business models. A business model is the unique way your credit union earns and spends money; the unique way your credit union provides delivery systems to attract and serve members; and the unique way you position yourself in the marketplace to attract business and grow. Every credit union has a business model but most of us don't know what it is. Kevin will inform you what it is, which current business models exist, which ones appear to be successful at the moment, and where business models may go in the next ten years.