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Credit Union Fall Forum
October 24, 2023

Time	Session	Description	Speaker
8:00	**Registration & Networking**	Join Temenos and our partners for breakfast and networking.	
9:00	**Temenos Keynote**	In the keynote, we'll provide an update on Temenos globally and regionally. We'll share some key milestones and customer success stories.	Dallan McManus, EVP Product, Temenos
9:15	**The Evolving Banking Landscape**	Several factors are driving rapid change and investment within the financial services industry. Learn where FIs are transforming and key investment priorities.	Christine Barry, Head of Banking & Payments, Datos Insights
9:35	**Temenos Origination & Collections Update**	Join this session to hear the latest Temenos product developments and get a glimpse into what is planned for the future.	Kris Frantzen, Vice President of Product, Temenos
10:00	**Journey Manager**	Explore innovative technologies that optimize customer experience, improve loyalty and accelerate new business growth.	Chris Wooldridge, Global Go-to-Market Lead, Temenos Chris Howell, VP, Business Solutions Group, Temenos
10:30	**Break**		
11:00	**Accelerate Innovation Using SaaS**	This session will discuss the resiliency, efficiency, security and scalability benefits of moving to cloud and the continuous positive impact to financial institutions. We'll also hear from GreenState Credit Union on their journey to cloud and best practices.	Corey Bowlby, Head of SaaS for Americas, Temenos Mike Stout, IT Business Systems Administrator II, GreenState Credit Union

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11:20	**Customer Success Panel**	Discover how All-In Credit Union, ENT Credit Union and FORUM Credit Union are leveraging technology to deliver better member and employee experiences.	Enrique O´Reilly, Americas Head of Customer Success & Support, Temenos
11:50	**Art of the Possible with APIs**	The open APIs are a centerpiece of the openness and flexibility the Origination and Collection modules provide customers and partners. We'll discuss and demonstrate how customers and Temenos leverage these tools to bring to life the "art of the possible".	Bill Jones, Principal Technical Architect, Temenos Kris Frantzen, Vice President of Product, Temenos
12:05	**Keynote: Fraud & Industry Insights from Experian, Equifax & TransUnion**	The session will provide a state of the market view from the industry's top 3 Credit Bureaus. The panelists will share insights into digital transformation and will address fraud concerns important to your credit union and members.	Mike Thibodeaux, Experian Fraud & Identity Vice President, Experian Brady Harrison, Director, Customer Analytics Solution Delivery, Fraud Solutions, Equifax Darron Cross Director, Identity & Fraud Solutions, TransUnion Kris Frantzen, Vice President of Product, Temenos
12:25	**Protecting Members & Driving Non-Interest Income**	TruStage will discuss the power of non-interest income (NII), a key strategy Credit Unions use to offer great rates and vital services to their members. Explore how enhancing digital payment protection, a crucial driver of NII, directly addresses member concerns, benefiting both members and Credit Unions alike.	Lance Hardyman, Strategic Partner Manager, Partner Management, TruStage
12:40	**Lunch**		

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1:45	**Bolster Your Automated Decisioning**	Learn how to put Temenos' robust decisioning engine to work to automate loan and account decisioning. This will also include an overview of the portfolio simulator, where customers can use real application data for data analysis and comparison of decisioning factors.	Dave Ehrlich, Senior Product Consultant, Temenos
2:30	Transition to next breakout		
2:45	**Collection Workspace Efficiencies**	Learn how to optimize your productivity with these handy tips and tricks on customizing the Workspace. You'll learn how to apply new functionalities to your existing systems and receive a wealth of knowledge from the Temenos team.	Robert Davis, Senior Product Consultant, Temenos
3:30	Networking Break		
4:00	**Best Practices for Admins**	Join us for an in-depth exploration of Temenos Collections and Origination System administration, where you'll learn proven techniques for efficient oversight, from setup to peak performance and security. Equip admins with essential tools and strategies for streamlined operations, covering data management, maintenance, and security, to maximize the solution value and reliability.	Manish Thukral, Senior Vice President, Customer Support, Temenos
4:45	Transition to next breakout		
5:00	**Collections Cases**	Unlock the potential of Cases for streamlining processes. Find out how Cases will allow you to integrate every collection process into a single system.	Andy Pavlik, Senior Product Consultant, Temenos
5:45	**Evening Reception**		

Time	Session	Description	Speaker
1:45	**Collection Business Rules**	Learn how Rules can help you to apply analytics to your collection activities. The Temenos team details how Rules are a supercharger for your collection system, making it faster, more powerful and more efficient.	Shana Goldson, Team Lead, Collections Consultants, Temenos
2:30	Transition to next breakout		
2:45	**Optimize Cross-sell & Counter-Offers**	In this session you'll learn how to more effectively cross-sell to your members and customers, customizing the pitches they receive and the decisioning process. You'll also learn how to better automate counteroffers based on specific scenarios. Offers can be customized to work based on multiple pieces of criteria.	Eric Meader, Senior Product Consultant, Temenos Morgan Kennedy, Senior Product Consultant, Temenos
3:30	Networking Break		
4:00	**Getting the Most From Origination Business Rules**	Learn from one of our most experienced consultants on just how business rules can optimize your processes. See a few proven scenarios that provided solutions to clients as we walk you through configuring the rules.	Eric Meader, Senior Product Consultant, Temenos
4:45	Transition to next breakout		
5:00	**Optimizing Document Performance**	Curious how to automate document processing and archival? In this session we will discuss the best ways to leverage this functionality and how to ensure this process is as hands off as possible.	Diana Laufer, Senior Product Consultant, Temenos
5:45	**Evening Reception**		

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1:45	**Upgrade to Cloud**	Deep dive into the resiliency, efficiency, security and scalability benefits of moving to Cloud and the continuous positive impact to financial institutions.	Corey Bowlby, Head of SaaS for Americas, Temenos Stacy Gable, VP Americas Services Head, Temenos
2:30	Transition to next breakout		
2:45	**Take your Member Experience to the Next Level**	Join this session to take a deeper dive on how you can manage your branding, products and features through configuration at your fingertips. Optimize your member journeys to improve conversion rate and onboard seamlessly into the Temenos loan origination platform in seconds.	Chris Howell, VP, Business Solutions Group, Temenos Nirmal Solanki, VP, Business Solutions Group, Temenos
3:30	Break		
4:00	**Discover API and Events Architecture That Puts Customers First**	Discussion and demonstration of API solutions that are available to you and will allow you to better serve your members.	Bill Jones, Principal Technical Architect, Temenos
4:45	Transition to next breakout		
5:00	**Discover API and Events Architecture That Puts Customers First (repeated session)**	Discussion and demonstration of API solutions that are available to you and will allow you to better serve your members.	Bill Jones, Principal Technical Architect, Temenos
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Time	Session	Description	Speaker
1:45	**Temenos Solution Spotlight**	During this session, you will embark on a journey through the latest technological advancements, strategic approaches, and transformative tools. Our expert presenters will delve into the key aspects of these solutions, highlighting their real-world applications and the measurable benefits they bring to organizations like yours.	Kris Frantzen, Vice President of Product, Temenos Heman Daswani, Principal Consultant, Temenos
2:30	Transition to next breakout		
2:45	**Driving amazing member journeys through certainty in identity and security**	Credit Unions are challenged to provide user journeys that maintain a high level of security and transaction assurance required by regulators and demanded by its members. Uniken accelerates possibilities with certainty in identity and security, ensuring amazing user experience. We will showcase how we can secure every step of your user interaction in a single, fully integrated solution that is invisible to your members and compliant.	Bimal Gandhi, CEO, Uniken
3:30	Break		
4:00	**Microsoft**	Forthcoming	Gansu Adhinarayanan, Partner Technology Strategist, Microsoft Michael Cordas, CEO, Bridge 2 Partners Kris Frantzen, Vice President of Product, Temenos Steve Dobrenski, Vice President North America Partner, Temenos

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**Temenos
Credit Union Fall Forum
October 25, 2023**

October 25, 2023
Plenary, Navarro Ballroom

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Time	Session	Description	Speaker
8:00	**Registration & Networking**	Join Temenos and our partners for breakfast and networking.	
9:00	**Uncover Potential to Close the Gap on Your Journey to Cloud and AI**	Digital cloud and AI transformation are credit union table stakes for security, data, member engagement and infrastructure growth – to name a few. No two transformation journeys are the same and shouldn't be. Microsoft will share guidance to help you uncover the potential of how these pivotal technologies close the gap to solve critical near-term priorities and long-term goals at the pace and scale right for your members and business.	Gansu Adhinarayanan, Director, Worldwide Partner Technology Strategist, Microsoft
9:20	**Temenos Credit Union Benchmark**	The Credit Union Benchmark Program provides our clients with tangible, data-driven insights into their business performance. This session will provide more details about the program, metrics and actionable outcomes.	Vincent Chamasrour, Customer Value Director Americas, Temenos
9:30	**Compliance Hot Topics & Trends**	We will discuss the latest compliance hot topics and trends that are impacting credit unions.	Greg Sawyers, Senior Vice President Compliance, Temenos
9:45	**What's New in Support!**	We will review the improvements made in support delivery, reporting and communication! We are "Back to the Basics"! Additional highlights will focus on what's coming in the next 6 months to improve customer experience.	Kim Hubbard, Senior Vice President Support, Temenos
10:00	**The Accutive approach to overcoming obstacles on the journey to implementation**	This session will provide a firsthand account of how Accutive designs and executes Journey Manager projects to maximize quality and minimize defects from the first sprints. Learn how Accutive leverages a quality-first approach to dodge pitfalls and pave a smooth path to your go live.	Neil Vany, Project Implementation Lead, Accutive
10:20	**Experian Connectors: Tools for holistic acquisitions, fraud mitigation, and debt recovery**	This session will discuss the various Experian Connectors offered through Temenos Originations and Collections. We will discuss strategies and tactics in creating and employing a holistic acquisition strategy that brings together historically disparate credit risk, compliance and identity verification assessments.	Tischa Agnessi, Community Lending Partnerships, Experian
10:40	**Networking Break**		

October 25, 2023
Speed Dating: 11:10am – 12:10pm, Navarro Ballroom
Lunch 12:10 – 1:15, Hidalgo

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Topics	Description	Speaker
API use cases	Discussion of API solutions that are available to you and will allow you to better serve your members.	Bill Jones, Principal Technical Architect, Temenos Nicki Luz, Head of Delivery, Temenos
Industry Trends	In this roundtable, we'll discuss the latest industry trends. Bring your perspective and questions.	Kris Frantzen, Vice President of Product, Temenos Jasna Hadzi-Tosev, Senior Consultant, Temenos
Moving to the Cloud	Join this session to learn more about transitioning to a cloud environment. Bring your questions!	Corey Bowlby, Head of SaaS for Americas, Temenos
Connectors & Third-Party Integration	We'll discuss integrations available, how to get started, and what the process is for Temenos to evaluate and onboard new integrations and vendors via our API or pre-built solutions.	Regina Saylor, Regional Partner Manager, Temenos Dennis Wasilewski, Vice President Product Management, Temenos
Is anybody doing "this" in Collections?	Collaborate and share! Show us how you leverage the collections system in a unique way to work for you.	Robert Davis, Senior Product Consultant, Temenos Steve Dunleavy, Senior Business Analyst, Temenos
Is anybody doing "this" in Origination?	Collaborate and share! Show us how you leverage the origination system in a unique way to work for you.	Diana Laufer, Team Lead, Lending Consultants, Temenos Chantel Lamberson, Team Lead, Temenos
Unleash Member Onboarding	Our best of breed solution takes user experience to a next level. Let's discuss how you can manage your branding, products and features through configuration at your fingertips.	Nirmal Solanki, VP, Business Solution Group, Temenos
Optimize Member Experience	Never set and forget. Let's discuss how you can continuously optimize your member onboarding journey and improve conversion rate.	Chris Howell, VP, Business Solution Group, Temenos
Credit Union Value Benchmark	How can Credit Union Benchmark help you refine your credit union's strategy and achieve its goals.	Vincent Chamasrour, Customer Value Director Americas, Temenos
Compliance Hot Topics and Pain Points	Bring your questions around compliance topics.	Greg Sawyers, Senior Vice President Compliance, Temenos

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		End of Sessions in Breakout 4	
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