

Sunday, March 6, 2011

Time 2:30 – 3:00 p.m.

Product Management Committee Meeting—Fantasia A & B

All members are welcome to attend the Product Management Committee meeting.

Time 2:30 – 4:30 p.m.

International Meeting—Fantasia F

All International (LACC) members are welcome to attend the International meeting and review the Best Practices presentations.

Time: 3:00 – 4:30 p.m.

Product Networking Meetings

Don't miss out on this wonderful opportunity to network with other members by product. We will vote for the Best Practices nominations from each product area.

Monday, March 7, 2011

Time: 8:30 – 9:30 a.m.

Fantasia G

Welcome

Fiserv Update (Domestic & International)

Presenter: Dave Santi and John Macaluso, Fiserv

Dave Santi will present an update for Fiserv, including the impact of new Reg E compliance. John Macaluso will present an update of the company's product and technology strategy, focusing on the areas of investment for 2011.

Time: 10:45 – Noon

Nutcracker 3

Life after Reg E

Presenters: Karl Durant, Associated Bank and Brian Johnston, 1st Source

This will be a user discussion session where we will discuss these questions along with any others you may want to bring. What effect have you seen on your bottom line? How have your customers responded? What challenges have you faced? Have you come up with alternate ways to either reduce costs or increase income or maybe both?

Nutcracker 1

Loan Roundtable I and Fiserv Update

Presenters: Larry Broker, Fiserv

Join us as Fiserv presents a release update and future enhancements. Fiserv has been focused on Commercial Lending first phase in 10.1. Find out what future enhancements you can expect to see on Commercial Lending, as well as other items.

Fantasia A & B

Bringing Single Customer Focus to View

Presenter: Gary Inman, State Bank & Trust

Join Gary Inman as he leads a discussion on obtaining a single customer view of your customers' relationship with your institution, providing an accurate, timely, and comprehensive view of the customer across channels and lines of business. We will discuss solutions you are using today and those you are looking to implement in the near future. Come prepared to learn from others and to share your thoughts and ideas.

Fantasia C & D

Building Analytical Tools to Help Minimize Risk

Presenters: Jerry Clark, Fiserv

In this session, the Risk and Compliance team will present Fiserv solutions that identify, analyze, and measure risk inherent in a financial institution's balance sheet. These solutions will also allow you to perform analysis of projected mitigation techniques and review alternate strategies for managing risk, maximizing revenue, and model for potential new business.

Fantasia E & F

CIF Tips and Tricks (International)

Presenters: Carter Whitmire, Fiserv

Does your organization want to take advantage of what the customer record has to offer? Does your organization want to clearly understand the customer, identify opportunities, provide un-parallel service and generate additional business? If the answer is YES to any one of these questions, then this session 'CIF Tips & Tricks' is for you. This session will assist you in unleashing the power of the customer record. It will bring to light how the customer record may be exploited for maximum gain to your organization. Information is power and being able to access all information in one controlled place will assist your organization in gaining market momentum. The Signature System was designed around the customer record. It was created as a customer centric system. Being a customer centric system provides your organization the ability of clearly understanding all associated relationships and being able to cross sell additional services. So... we encourage you to attend this 'not to be missed' forum.

Nutcracker 2

Branch Services Roundtable I and Fiserv Update

Presenters: Julie Ahmann, State Bank & Trust, Anna Eliassen, Central Bank & Trust and Andrew Steadman, Fiserv

Fiserv Signature will provide product updates to Desktop for Signature. Hear about the work done this year and some of the enhancements included in Desktop for Signature 11 X. After the updates we will begin our first roundtable discussions based on a list created by the Users in the monthly calls prior to the conference and from the Product Networking Meeting held Sunday afternoon.

Time: 1:30 - 2:30 p.m.

Fantasia G

Keynote Presentation

Compliance and Audits and Regs, Oh My! How to Navigate a Changing Regulatory Landscape and Reach Your "Oz"

Presenter: David Peterson, i7strategies

The changes in regulatory issues have been fast and furious. Changes to Reg DD and Red E threatened one-time debit NSF revenue. NACHA Rules changes have made it harder for FIs to originate ACH. The Fed released new rules on credit card issuers. Dodd/Frank further threatens the types of services that FIs have relied on to generate non-interest fee income. All this while the economy has been in the worst slump in over 25 years. Most FIs look at this landscape and have "retreated into the bunker" to ride out the storm. However, a few FIs will look strategically at the "green shoots of recovery" and manage the changing regulatory environment, using it to make changes that will strategically poise them for future success. By changing the way you think about products and services, pricing and how customers feel about a banking "relationship", you can redirect your focus away from ala carte banking into a larger, more profitable relationship that will last beyond the recovery. This session will encourage you about the future of financial services for those with strategic vision and provide you with specific strategies for you to implement in your institution.

Time: 3:00 – 4:15 p.m.

Nutcracker 3

Deposit Roundtable I and Fiserv Update

Presenters: Brian Johnston, 1st Source and Melissa Myerski and Susan Lynchard, Fiserv

This will be an interactive session for sharing ideas with other users. This will be a shared session with Fiserv personnel giving an update on release contents and discussing our ideas and questions.

Nutcracker 1

Commercial Revolving Line Functionality

Presenters: Barb Crocker, First Bank, Brenda Swanson, Northwest Savings Bank and Larry Broker, Fiserv

The first phase of the Commercial Lending was in the 10.1 release. Join Fiserv and Users in a discussion and demo of the new functionality and how Users are currently using the Commercial Lending Module today.

Fantasia A & B

Source Capture Optimization

Presenters: Amy Drake, Integra Bank, Gary Brand and David Hamilton, Fiserv

This session will cover multiple aspects of Source Capture Optimization (SCO). Amy Drake of Integra Bank will present her bank's experiences with its branch capture and item processing roll-out last year. During the second half of the session, Fiserv will discuss the Product Roadmap for SCO and operational enhancements.

Fantasia C & D

Risk & Business Intelligence Roundtable & Fiserv Update

Presenters: Sean Profitt, Central Bank & Trust and Fred Wallace, Fiserv

Join the Risk & Business Intelligence group for a general update regarding Fiserv as it relates to the Risk & Business Intelligence products. This roundtable will be focused on open discussion between Fiserv users on topics and Best Practices revolving around Data Warehouse, AS400/Signature Security, Call reporting, G/L (including IPS Prologue), and Fraud detection tools (Net Economy).

Fantasia E & F

Kiosks as a Revenue Earning Delivery Channel (International)

Presenter: Yvonne Schmeltz-Setrokario, DSB

The Self-service landscape is changing and with Kiosks, customers are able to quickly, safely and effortlessly pay their bills and also do a wide range of additional financial services. The Kiosk service(s) works in cooperation with participating companies and besides cost savings and cash handling, this service is revenue earning and also able to sell products with their marketing capabilities.

Nutcracker 2

Best Practices on Release Updates and Installation

Presenter: Antonio Becerra, Exchange Bank, Scott Hartlaub, ACNB Bank, Jo Ellen Holberg & Jesse Hughes, Metro Bank

Join our panel in discussing the best practices for installing Desktop Sales and Teller releases. This session will also include best practices for care and feeding of the data bases.

Tuesday, March 8, 2011

Time: 8:30 – 10:00 a.m.

Fantasia G

Best Practices Presentation and Voting & User Group Business Meeting

Come listen to the Best Practices from each product group and vote on this year's winner. Also, learn more about what the User Group has to offer at this annual business meeting.

Time: 10:30 – 11:45 a.m.

Nutcracker 3

Increasing Revenue through Rewards Programs

Presenter: Sue Cravillion, Associated Bank, Andrew Puntch, Peoples Bank and Doris Hannan, Heartland Financial

We will discuss how a rewards program can increase revenues, banks who currently have a rewards program will answer these questions.

- Was your bank's rewards program developed internally or using a 3rd party? How does it work? Has it increased revenue measurably? How do you measure?
- If your bank has not implemented a Rewards program, is it in your short term goals?

Nutcracker 1

Loan Compliance Update

Presenters: Sam Teague, The Teague Consulting Group

Sam Teague will join us for this session to provide a brief look at current legislative and regulatory developments that impact the lending area. This session will also include a review of selected emerging issues and "hot topics" of interest to financial institutions.

Fantasia A & B

Self Services Roundtable

Presenter: Sean Proffit, Central Bank & Trust Company and Maggie Ramshaw, Fiserv

Join this informal discussion on opportunities and challenges in consumer behavior and financial self services. This roundtable session will be an open discussion related to products available to customers in the Self Service arena such as Internet banking and bill payment, mobile banking, EFT, and VRU.

Fantasia C & D

Architecture Roundtable I and Fiserv Update

Presenters: Gary Inman, State Bank & Trust and Kenn McHugh, Fiserv

Join Fiserv architect Kenn McHugh as he reviews the new messages being developed for Communicator. Kenn will also review the Fiserv development methodology and how Communicator messages are developed for each project along with Web Methods and the Roadmap for the next few years. After the updates we will begin our first roundtable discussions based on a list created by the Users in the monthly calls prior to the conference.

Fantasia E & F

CIF Compression (International)

Presenter: Fabian Waugh, National Housing Trust and Carter Whitmire, Fiserv

The CIF data is the center of your Signature/ICBS database, and every now and then you may end up having multiple records representing the same person. This is bad for your database and may end up costing you in the long run. In the session we will discuss some of the strategies to identify, merge duplicates and ultimately prevent this from happening. We will also look at other business applications of the methods used to identify duplicates.

Nutcracker 2

Desktop Teller and Sales

Presenters: Julie Ahmann, State Bank & Trust, Anna Eliassen, Central Bank & Trust

This session will focus on key topics and issues brought forward by Desktop Users. Join us as we continue our discussion on testing strategies from the October Peer Topic call. We will also discuss common support calls and how we can best share information on work arounds and resolutions. Your peers often provide the best solutions for issues you may be experiencing.

1:15 – 2:30 p.m.

Nutcracker 3

Deposit Compliance Update

Presenters: Sam Teague, The Teague Consulting Group and Susan Lynchard, Fiserv

Sam Teague and Susan Lynchard will discuss what Regs are on the horizon and how Fiserv will address these new regs. Time will be available for Questions and Answers.

Nutcracker 1

How to Manage Loan Data

Presenters: Sherry Yonda, Heartland Financial, Dan Tabraham, ViewPoint Bank, Judy Rutledge, Exchange Bank and Fred Wallace, Fiserv

Please join us to discuss different practices on how loan data is managed. This will take us from how methods of handling file exceptions, working with and maintaining User Fields to the benefits for using Data Warehouse.

Fantasia A & B

Online Channel Optimization Means Intuitive, Integrated Personal Financial Management For All

Presenter: Geoff Knapp, Fiserv

Intuitive, integrated Personal Financial Management is the cornerstone to success within the online channel. Whether experienced through an iPad, mobile device or a PC, Fiserv's innovations across all channels ensure that every consumer is empowered to transact how he wants, when he wants with whatever device is convenient for him. From personal payments via ZashPay, mobile banking via Mobile Money or online banking through Corillian Online, Fiserv deploys best-in-class solutions to fully optimize the online channel for every financial institution. Built to work independently or collectively, Fiserv's line of online channel solutions are unsurpassed in quality and lay the foundation for any financial institution looking to provide a comprehensive personal financial management experience for its customers.

Fantasia C & D

Architecture Roundtable II

Presenter: Gary Inman, State Bank & Trust and Kenn McHugh, Fiserv

Join Fiserv architect Kenn McHugh and Gary Inman for a lively exchange of ideas, issues and solutions! This is a great way to get information about issues you may have and the creative solutions others have found! We will discuss certain topics like architecting an Information Management Strategy, SQL, ESB, SOA, DR, Fraud, Retention, and bringing tighter Integration across the platforms. This is a popular session where users can bring their questions, topics of discussion, and items to share with your fellow users. Don't miss this opportunity to network.

Fantasia E & F

G/L in the 9.0 Release (International)

Presenter: Larry Broker, Fiserv

Come and learn more about all the new G/L enhancements built in the 9.0 release of the International Signature Core that will help a bank utilize the expanded G/L capabilities inside the Core. Share how banks on the 9.0 release have incorporated some of these enhancements into their daily operations.

- Detail G/L extract to support summary entries
- Enhanced security and control
- Allow Income and Expense accounts to be in foreign currency
- Revaluation
- Real-time transaction history

Nutcracker 2

Branch Services Roundtable II

Presenters: Julie Ahmann, State Bank & Trust, Anna Eliassen, Central Bank & Trust

Discussion continues from Roundtable I. We have great monthly User Group calls, here is your opportunity to continue those informative discussions. This is a great way to get information about issues you may have and the creative solutions others have found! We will also take a look at the user experience converting from Desktop Sales to Aperio.

Time: 2:45 – 4:00 p.m.

Nutcracker 3

Deposit Roundtable II

Presenters: Brian Johnston, 1st Source

This session will be dedicated to open discussion among users. Questions that have been submitted will be discussed as well as discussion from the floor. Review of bids will be included in this session.

Nutcracker 1

Loan Roundtable II

Presenters: Judy Rutledge, Exchange Bank

This roundtable is for the users. It's what this conference is about. Always a popular session where users can bring their questions, topics of discussion, and items to share with your fellow users. Don't miss this opportunity to network.

Fantasia A & B

Maximizing Customer Opportunities with Aperio

Presenter: Panel from American Savings Bank, Broadway Bank and State Bank & Trust

Join this session to hear a group of your peers discussing how their institutions have successfully implemented Fiserv's Aperio product to enhance the "customer experience" through increased efficiencies and workflow. Aperio is not just a platform system. It is a multi-channel sales and service solution designed expressly for financial institutions to enable a consistent customer experience across branch, call center and Web channels, as well as allowing back-office processes to be rapidly re-configured to meet evolving business needs. By integrating a business process engine as a foundation of the solution Aperio can: eliminate re-keying of data to multiple systems, eliminate the need for multiple applications on the Desktop to view and manage the customer, automatically manage the flow of work around the organization.

Fantasia C & D

Managing Payment Fraud

Presenter: Stephanie Fuoco, Fiserv

Join this session on a general discussion on Fiserv's payment risk management and mitigation tools designed for financial institutions. The Risk Office is an investigative and consultative service you can leverage to manage the impact of fraud on your business. The Risk Office will research the root cause of incidents as they arise and determine appropriate solutions and strategies to mitigate your exposure. With the Risk Office, you'll get expert direction and optimal risk management services to protect, detect and respond to your card fraud risk exposure. Other solutions within this product suite will also be presented.

Fantasia E & F

International Enhancement Recommendations (International)

Presenter: Fabian Waugh, National Housing Trust

In this round table discussion we look at the Modifications/Customizations done by various Banks in the group as well as items that do not currently have a work-around, with the aim of making them into release considerations.

Nutcracker 2

Utilizing Fiserv as Support for Business Continuity

Presenters: Toby Miller, Fiserv

Join Fiserv Toby Miller as he presents Utilizing Fiserv as Support for Business Continuity. He will be discussing a recent implementation of a Fiserv client as an example of a Fiserv led Business Continuity planning, under that to help with the DR plan, Business Continuity plan and DR perspective. Discussion points will cover Disaster Recovery environment for availability and recoverability along with Defining High Availability vs. Disaster Recovery on the Availability Continuum. This session is sure to be interesting and action packed.

Wednesday, March 9, 2011

Time: 8:30 – 9:30 a.m.

Fantasia G

Best Practices Award and Giveaways

Top 7 Ways to Drive Your Best Customers Away – David Peterson

In the rush to keep up with the competition, many community financial institutions took the easiest, quickest, or cheapest route to rolling out their online services. The result isn't just a disappointment to customers; it's often reason enough for those customers to go elsewhere for their banking needs. Join us for a review of the top seven things you must get right to prevent your online services from driving customers away. Learn the mistakes made in usability, delivery, marketing, and differentiation...plus a whole lot more.

Time: 9:45 – 10:45 a.m.

Nutcracker 1

Relationship Pricing Workshop – Fiserv Signature

In this session, you will hear about plans around the development of Relationship Pricing for Signature. This project addresses the needs of our client base in being able to flexible price and reward at the relationship – rather than the account – level. Join Product Manager Melissa Myerski and members of the development and product management team as we discuss scope and objectives.

Nutcracker 3

Improve Your Image to the Client with DocPlus – Fiserv

Do you want to spruce up the look of your client-facing documents? Would you like to be creative with your messaging? Come and hear about the DocPlus solution that is fully integrated into Nautilus and eDoc Distribution. This solution can also automate and improve your statement processing. DocPlus is a comprehensive document customization and correspondence solution. Fully integrated with the Signature core financial services system from Fiserv, DocPlus provides the ability to create customized documents, to include statements, letters, forms, quotations, notices and more. Correspondence can be produced from a variety of databases and distributed via Fiserv EDD, post, fax, e-mail and SMS messaging for efficient, cost-effective customer service. By adopting your own unique set of standards, including formatting, font and colors, your institution can ensure a consistent look across all documents. DocPlus enables the organization to successfully generate, print and distribute customized documents that meet the unique requirements of the organization.

Fantasia C & D

New Industry Solution Hubs -- IBM

Ari Kugler is responsible for business development in Power & Z and is responsible for the i Business. Ari is driving new business initiatives around i series and is working with ISVs, business partners and integrators in order to help build new products and models for i series. He will review trends around i series, specifically around Cloud initiatives, workloads and new business models.

Nutcracker 2

User Friendly Financial Websites -- HeathWallace

Do you ever wonder how you can acquire more customers online? Do you wish your site was easier to navigate and simpler to buy from? Do you wonder what users even do when they get to your site? HeathWallace have these answers. HeathWallace are specialists in creating highly usable and commercially effective websites. HeathWallace will take the audience through their process for creating user friendly sites which meet your site objectives.

Time: 11:00 – Noon

Nutcracker 1

Preparing for Signature UI – Fiserv Signature

In this session, join the Fiserv team to hear about considerations and preplanning activities for introducing the new GUI, which replaces CBSPlus. We will review technical considerations and implementation planning with members from the development team, implementations and client services. Built using HATS technology, this solution improves total cost of ownership and the user experience.

Fantasia C & D

Maintaining Financial Control through Automated Reconciliation Processes -- Fiserv

Ensuring/reconciling anticipated activity vs. actual activity is an integral part of any financial transaction lifecycle. Organizations that participate in a significant number of financial transactions need to reconcile that activity. Automating reconciliations, exceptions management and account certification in near real-time is key to reducing losses and maintaining financial control. Learn how Fiserv helps institutions increase compliance and financial control in relation to internal and external audits, SOX, Basel II and PCI. See how Fiserv also helps reduce costs through processing efficiencies, including process standardization and automation of reconciliation and exception management across all business lines

Nutcracker 3

Same-Day ACH: What's Next? – Steven Cordray, Federal Reserve Bank of Atlanta

In August of last year, the Federal Reserve initiated the first material change to ACH schedules in over 35 years. The new service has the potential to offer same-day clearing and settlement for about 40 percent of the payments received by the Fed. For the first time, ACH is within striking distance of matching other payment networks such as check image and cards and offers the first initial steps at being competitive with what is available in other countries. The Fed will provide an overview of the current service, discuss the status of banks, corporates and other participants, early experiences and lessons learned from the implementation of the service, and expectations for future same-day payment applications. This presentation offers an excellent opportunity to learn where we are today and immediate next steps for this service.

Nutcracker 2

Proformance

This session will give a demonstration of INFO-ACCESS:

- Tickler, notices and exception tracking integrated with document imaging for deposits and loans (commercial, mortgage, consumer)
- Loan data collection and automated credit memo creation
- Reporting (Technical exceptions, Loan concentrations by risk rating and industry, weighted average risk rating, past due by loan officer, etc.)

Demonstration of INFO-CAPTURE - E-signature and automatic indexing interfaces to:

- Fiserv Desktop
- Fiserv EasyLender

Time: 1:00 – 2:00 p.m.

Fantasia E & F

International Regional Meeting

The International Users will again have their post conference regional meeting to continue the networking experienced during the conference.