

THE ALABAMA BANKERS  
ASSOCIATION, INC.

# Bank Operations Management Summit AND TRADE SHOW

Supervisors ■ Marketing & PR ■ Operations & IT ■ Human Resources

*This conference will address the latest issues facing bank managers in today's challenging environment.*

## SUMMIT AGENDA

*Times are tentative and may change.*

### Wednesday, Feb. 6

8:30 a.m.	Registration Continental Breakfast
9 a.m.	General Session
10 a.m.	Break in Trade Show Area
10:15 a.m.	General Session
12 noon	Lunch in Trade Show Area
1 p.m.	Breakout Sessions
2 p.m.	Break in Trade Show Area
2:30 p.m.	Breakout Session
3:30 p.m.	Adjourn

### Thursday, Feb. 7

8 a.m.	Continental Breakfast
8:30 a.m.	General Session
9:30 a.m.	Break in Trade Show Area
9:45 a.m.	General Session
10:50 a.m.	Peer Group Forums
11:50 a.m.	Lunch in Trade Show Area
12:50 p.m.	Legal Panels
2:20 p.m.	Breakout Sessions
3:30 p.m.	Adjourn

**CONFERENCE  
QUALIFIES  
FOR  
12 CPE CREDITS!**

## General Session Speakers WEDNESDAY, FEB. 6

### Innovation that Keeps Your Feet on the Ground and Your Head in the Clouds featuring Jeff Rendel

Innovation is more than a corporate value, core competency, or strategic objective. As swiftly as the world of business is shifting, your customers are counting on you to design, develop, and deliver imaginative and resourceful products and services to better their lives and businesses. Innovation is not an isolated event: it is a standard action practiced by organizations creative and ambitious enough to shape the future of their business, one idea at a time. Innovation, without doubt, involves looking inside your company for ways to integrate more efficient systems, converting customer insights into relevant solutions, and adapting to new strategies that work in dynamic markets. It tinkers with your business every day – matching necessity to utility, constraint to possibility, and need to demand.



### The Ultimate Goal of the Game: The Science of Breaking Bad Habits, Going Beyond Motivation to Achieve Your Goals featuring Jeff Compton

Your mind is programmed with principles, habits, behaviors and values that govern every aspect of your life. Many times the things that are programmed within our minds create more problems than we know. Based on his book "I Think Therefore I Can!" Jeff will show you in his hilarious, but no-nonsense, "I never thought about it that way before" style, the inner workings of the mind and how to reprogram it. He not only shows where your behavior originates, he also demonstrates proven techniques that you can use to alter distracting behavior at work and at home.



### Are You Connected? How to "Hard Wire" Every Employee Back to the Customer featuring Mark Faircloth

Mark will show you how to improve performance throughout the bank by building a more unified culture showing how to connect everyone from the "floor level" to senior management back to the customer. Mark has identified four steps to making a better connection:

- Keep the message simple – tie all communication to the organization's goals and mission
- "Hard wire" each employee to the customer – Keep each team member no more than two connections from the customer and communicate this to every employee.
- Develop a "common language" for clear communication inside/outside the bank
- Integrate resources – coordinating delivery of service to customers and collect and share usable information throughout the organization.



## PEER GROUPS

Thursday at 10:50 a.m.

Peer Group Forums for the following departments will be facilitated by industry experts. Below are the sessions that will be offered:

### MARKETING

facilitated by  
Mark Arnold

### HR & SUPERVISOR

facilitated by  
Nicole Pinkham

### IT PEER GROUP

facilitated by  
Joe Lima

# General Session Speakers THURSDAY, FEB. 7

## The Banking Customer of the Future featuring Mark Arnold

The customer of the future: the notion conjures images of robot maids cleaning our ultra-modern houses like The Jetsons. The reality, however, is compelling and demands our attention. Tomorrow's customer isn't a Baby Boomer, a Gen Xer or even a Millennial. While they may share components of all these age ranges, this person will possess their own unique sets of challenges and demands on the retail banking environment.



## Put the P.E.P. in Your Step: Creating an Environment Where Everyone is Fired Up and Excited featuring Nicole Pinkham

Putting the P.E.P. in Your Step requires pride, excellence and passion. A drum majorette leads a band onto the field with enthusiasm and tenacity in front of thousands of fans, and we can lead others with the same charge. Learn how to apply these principles in order to create an environment where everyone is fired up, excited and ready to accomplish more than anyone could ever expect.



## REGISTRATION • ABA Bank Operations & Management Summit and Trade Show

Please return form and appropriate fees to: ABA, P.O. Box 241166, Montgomery, AL 36124. Fax: (334) 244-9382. Email: lgarrett@mycbaa.com.

### REGISTER NOW & SAVE!

- **REGULAR MEMBER RATE (after Dec. 15): \$395** for the first attendee; **\$195** for each additional attendee from same organization
- **Non-Member Registration Fee:** \$545 for the first attendee; \$295 for each additional attendee from the same organization

**A Full Conference Registration includes:** continental breakfast and lunch on both days, breaks during the business sessions, all business sessions and seminar materials.

Name \_\_\_\_\_ Bank \_\_\_\_\_

Title \_\_\_\_\_ Department \_\_\_\_\_ Email \_\_\_\_\_

Phone \_\_\_\_\_ Address \_\_\_\_\_

City, State & Zip \_\_\_\_\_

Additional Attendees: Name \_\_\_\_\_ Title \_\_\_\_\_ Dept. \_\_\_\_\_

Name \_\_\_\_\_ Title \_\_\_\_\_ Dept. \_\_\_\_\_

Name \_\_\_\_\_ Title \_\_\_\_\_ Dept. \_\_\_\_\_

**PAYMENT METHOD** • Total Fees Due: \$ \_\_\_\_\_

Please send me an invoice.  Check enclosed.

Please bill the following credit card:  Visa  MasterCard  Discover  American Express

Credit Card No. \_\_\_\_\_ Exp. \_\_\_\_\_ Signature \_\_\_\_\_

**CANCELLATION POLICY** • ABA will refund registration fees up to five (5) business days prior to the conference, minus a \$100 cancellation fee. On or after January 29, 2013 no fees will be refunded but substitutions are welcome! • **ACCOMMODATIONS** • Rooms may be reserved directly through Embassy Suites by calling (800) EMBASSY. To receive the special group rate of \$140 per night, please reference CBAA and make your reservation by Jan. 14, 2013.

For more information, please call ABA at (334) 244-9456 or email us at lgarrett@mycbaa.com or lslaughter@mycbaa.com.

**VISIT US ON THE INTERNET AT [WWW.MYCBAA.COM](http://WWW.MYCBAA.COM)!**

# BREAK-OUT SESSIONS

## Wednesday, Feb. 6 ■ 1 - 2 p.m.



**Getting More With Less: The Psychology of Supervising People in Today's Workforce** featuring **Jeff Compton** - The old traditional ways of managing no longer work and will never work again. Organizations are looking to get more from less. The experts agree that the only way that management is going to prosper and be agile enough to survive long term is to build a people-centric management environment. In this powerful thought-provoking program, Jeff exposes the mentality that causes managers and supervisors to make their jobs harder in today's workplace.



**Loan Growth Through Effective Marketing** featuring **Sean Cunningham** - The average household in America has 18 financial products with seven different institutions, while your bank has only 2.4 of them. Have you ever wondered where the other 15.6 products are? Think about this statistic for a minute; if your bank has \$250 million in its loan portfolio, your existing customers have over \$1 billion dollars in loans at other institutions! This session discusses and shares strategies that have produced millions of dollars in loans.



**Hot Topics in Banking IT** featuring **Lisa Traina** - This session will highlight what's new in the world of technology in the banking industry. Updates on internet banking authentication, regulatory guidance, ACH and wire transfer fraud, cloud computing, mobile devices, current security threats and more will be provided, along with highlights of new technology appearing in financial institutions.



**Best Practices in Compensation Management** featuring **Bruce Johanson** - With all of the recent legislation and issues around compensation, it is critical for organizations to establish a sound and defensible compensation management program. This session will cover the essential components including job descriptions, job ratings, market analysis and salary administration structure and policies. The end result is to ensure an internal equitable and externally competitive work environment that attracts and retains quality Bank personnel.

## Wednesday, Feb. 6 ■ 2:30 – 3:30 p.m.



**Customer Loyalty Guaranteed – How to Out-Smart, Out-Market, Out-Serve and Flat Out Do What Your Competitors Can't** featuring **Jeff Rendel** - Set aside the platitudes of loyalty, customers have an uncomplicated list of demands: give me what I want, when I want it, and reward me for it or I'll go somewhere else and get it. In a marketplace that defines all participants as a commodity, it's time for your company to become an absolute necessity. Superior customer service and lifelong commitment hinges on: thorough knowledge about your customers; managing customers as investments; rewarding those who choose you most; and, creating campaigns that increase your customers' lifetime value to your company.



**The Top 10 FDIC IT Examination Citations** featuring **Lisa Traina** - The most common FDIC IT examination citations and recommendations will be discussed. In this session, you will learn tips for resolving these issues before citations appear in your next examination report.



**Conducting Effective Performance Evaluations** featuring **Bruce Johanson** - The most important word of advice about performance evaluation is "Do them right or don't do them at all." This session will provide the insight and understanding of the 4 Ws and the how to "Do them right" with the end result being to strengthen the bank's human resources.

## Thursday, Feb. 7 ■ 2:20 – 3:15 p.m.



**Health Care Reform** featuring **Cooper Johnson** - Cooper will help bankers understand the complexities of the health care reform laws. The following topics will be discussed in depth: Penalties on Individuals and Businesses in 2014, Market Trends, Defined Contribution Plans, and State Healthcare Exchanges.



**Implementing Effective Security Controls** featuring **Joe Lima** - Denial of Service Attacks, Phishing, Man-in-the-Middle Attacks, ACH Fraud, Money Mules, Malware. These and several other such threats are costing banks negative exposure and serious financial losses. Recent FFIEC Supplemental Authentication Guidance mandates that all banks implement layered security controls to minimize the risks associated with recent attacks to online banking systems. This session will discuss effective controls that can be implemented on both the bank and business customer's systems that will help prevent, detect and respond to threats identified in recent cybercrime attacks.



**The Top 10 Marketing Trends Every Bank Should Know** featuring **Mark Arnold** - Financial institutions must become savvy marketing organizations to survive in the future, which means they must have a working knowledge of this key field. As a marketing executive and author, Arnold provides thoughtful insights for financial institutions to consider. This session examines trends including: Marketing & technology fields merging, CRM will dominate, Sales culture rules!

## LEGAL PANELS

Thursday at 12: 50 p.m.

Multiple legal panels will be offered giving the opportunity to choose the most pertinent topics for your area. There will also be time allotted for question and answers. Topics to be announced.

## TRADE SHOW

Attendees will have the opportunity to interact with a variety of vendors offering cutting-edge products and services for community banks.

**The Trade Show will be open during breakfasts, lunches and breaks.**

## Trade Show VENDORS

- AaSys Group, Inc.
- AccuSource Solutions
- Alabama ACH Association
- Alabama Housing and Finance Authority
- Banker's Dashboard
- BankSmart
- Banc Statements, Inc.
- CashTrans
- CenterState Bank
- Central Alabama Title Center
- Computer Services, Inc.
- Data Center, Inc.
- First Data
- High Cotton
- Merchants' Choice Payment Solutions
- PrintMail Systems, Inc.
- R.A. Headrick, Jr., CPA, LLC
- Safe Systems, Inc.
- Saltmarsh, Cleveland & Gund
- Shazam Network
- STS Group
- TIB - The Independent Bankers Bank
- Vantiv, LLC

THE ALABAMA BANKERS ASSOCIATION, INC.

# Bank Operations Management Summit

## AND TRADE SHOW

Feb. 6-7, 2013

New Embassy Suites, Galleria | Hoover



**Supervisors ■ Marketing & PR ■ Operations & IT ■ Human Resources**

### **The Alabama Bankers Association, Inc.**

P.O. Box 241166  
Montgomery, Alabama 36124

**Many thanks to  
our sponsors!**

#### **DELUXE SPONSORS**

Alabama Banking Services, Inc.  
Bryant Bank  
ServisFirst

#### **PREMIUM SPONSORS**

AccuSource Solutions  
BankSmart  
Saltmarsh, Cleaveland & Gund  
STS Group  
The Baker Group

#### **GENERAL SPONSORS**

Banker's Dashboard  
CashTrans  
Mauldin & Jenkins, LLC

