



**FSI'S 34TH
NATIONAL IN-STORE
BANKING CONFERENCE**

**FSI
FIESTA**

**APRIL 14-16, 2020
OMNI LA MANSION DEL RIO
SAN ANTONIO, TEXAS**

IN-STORE • STOREFRONT • ON-SITE





IDEA EXCHANGE COMPETITION



FSI is committed to providing you practical, successful ideas to help you grow your institution. To do so, we compile and organize creative, effective promotions submitted all year long via the Idea Exchange. These proven promotions are on display for all attendees to explore.

FSI Members* compete for prizes by submitting their best promotion(s). Submissions will be awarded in the following categories:

- FSI Signature Award
- Best Décor/Presentation
- Best Branch Activity
- Best Employee Activity

Participants do not have to be present to win. Winners will be chosen by attendees' votes, select speakers, and FSI staff and announced at the conference and posted on FSI's Facebook page. The FSI Signature Award winner receives a staff dinner hosted by FSI. Each other category will be awarded a \$50 VISA® gift card.

Members: For more information or to enter your idea, log on to The Smart Cart and click Submission Forms. All entries must be received by **March 6** to be displayed and considered for voting.

www.supermarketbank.com

2019 ATTENDEE COMMENTS

"This conference has the most innovative presentations with impactful messages all in one place."

"Great information for those building a strong retail team!"

"Best conference ever!"

"Best speakers in the industry."

"I will go wherever FSI goes. It's worth the time!"

"Loved meeting peers from all over the country."

"So much insight and always great takeaways."

"Engaging speakers and events!"

"I learn so much every year."

"All presenters were a wealth of knowledge and entertaining."



OLE! IT'S FIESTA TIME!



Join us as we celebrate the premier event for banks and credit unions operating in retail environments – **in-store, storefront, and on-site locations**. This three-day conference is for the financial institution working to ensure a strong retail culture and securing long-term success.

Our program is focused on your financial institution's retail challenges, banking trends, and opportunities. You'll hear from the pacesetters, visionaries, and trailblazers who are revolutionizing the branch experience and walk away with strategies to deliver personalized and positive experiences for your customers/members. Build your network of valuable peer connections as you share success stories and overcome common challenges.

With its blended culture, genuine hospitality, and historic architecture, San Antonio is an excellent choice for FSI's National In-Store Banking Conference. Spanish colonial architecture, parks, and plazas make it one of America's most picturesque cities. While you are here, stay and experience the best of San Antonio's Fiesta, April 17-27. The citywide, 10-day celebration is held every April and hosts more than 100 events throughout the city including parades, patriotic observances, exhibits, and of course, food-centric affairs.

Now is the best time ever to be in the retail banking business. In this ever-changing world and industry ***there's no time to siesta, let's fiesta!***

LEADER SUMMIT* • TUESDAY, APRIL 14

12:00 – 1:00 PM | LEADER SUMMIT REGISTRATION

1:00 – 4:00 PM | LEADER SUMMIT

**This event will require a small fee and pre-registration. Space is limited.*



Banking conferences focused on technology, changing consumer preferences, network optimization, and "branches of the future" are not uncommon. These are all important issues facing bank and credit union leaders today. Yet, the most important factor in the success or failure of the myriad of strategic changes financial institutions face is too often overlooked. In an industry of increasing change, our people – the moving parts of our organizations – are more important than ever. Evolving strategies are only as effective as our people's ability to evolve as well.

Facilitated by Dave Martin, author of the FSI newsletter, The Advantage, and broadcaster of FSI's podcasts, this Leader Summit will bring together dynamic banking leaders to discuss not only their companies' evolving strategies, but how they are keeping their people engaged and at the center of these strategies.



DAVE MARTIN

FOUNDER
BANK MECHANICS
SUGAR LAND, TX



BEN HOPPER

SVP, HEAD OF STRATEGY
CONSUMER BANK – FIRST HORIZON
MOUNT JULIET, TN



SHAWN O'BRIEN

CONSUMER BANKING EXECUTIVE
ATLANTIC UNION BANK
RICHMOND, VA



DAN SHOOP

SENIOR VICE PRESIDENT
PNC BANK
ELKTON, MD



MORRIS JACKSON II

CONSUMER AND BUSINESS BANKING
MARKET LEADER – U.S. BANK
LAS VEGAS, NV



TUESDAY, APRIL 14 • 4:00 – 6:00 PM

WELCOME RECEPTION • REGISTRATION • IDEA EXCHANGE PREVIEW

Fajitas, margaritas with salt and lime - that's right, it's Fiesta time! Join us for beverages and appetizers, gather your conference materials, and browse through the Idea Exchange. This opportunity is perfect for reconnecting with FSI staff and mingling with peers from your industry. Afterwards, get outdoors and explore the city's famous River Walk. Right out the hotel's back door, the River Walk winds through the heart of San Antonio and features shopping, restaurants, and river barge tours showcasing this city's incredibly rich history.



WEDNESDAY, APRIL 15



8:00 – 9:00 AM | BREAKFAST BUFFET • 9:00 – 12 NOON | GENERAL SESSION



MICHAEL SANSOLO RETAIL & CONSUMER SPECIALIST
SANSOLO SOLUTIONS, LLC • WASHINGTON, D.C.

SCIENCE FICTION TO RETAIL REALITY: HOW DIGITAL COMPETITORS AND CONSUMERS ARE RESHAPING EXPERIENCE

Technology and changing consumer expectations in combination are likely to vastly alter the retail experience in the very near future. This new study, assembled with a team of retailers, examines stores changing to create a winning formula to satisfy shoppers, compete with technologically-enabled companies, and create an entire new shopping experience to serve the future. Michael's insights from the front lines of consumer behavior arm him with a special vision on issues important to you and your organization. And it's all presented with a touch of humor that delights and engages audiences around the world.



KRYSTAL ADAMS AVP/MEMBER EXPERIENCE
TUCSON FEDERAL CREDIT UNION • TUCSON, AZ

TRANSITIONING TO A DIGITAL EXPERIENCE

TFCU has spent the last five years creating and implementing a member experience digital transformation designed to bring cutting-edge technology to its membership while maintaining a high level of engagement. Krystal is excited to share that the implementation of ITM technology has centralized operations, enhanced engagement through video, and transitioned basic transactions away from the lobby so the in-branch, consultative staff can create customized 6th Star Member Service for every person every day.



LINDSEY GREEN PRESIDENT
EXTRACO CONSULTING • WACO, TX

READING YOUR CUSTOMER'S MIND: BALANCING HIGH TECH AND HIGH TOUCH

Extraco Banks, an affiliate corporation of Extraco Consulting, built a strategy called SWARM Banking to address today's challenges of balancing high tech and high touch through a Universal Banker model. Lindsay will share the phased progression of the implementation model and the common speedbumps present in implementing a universal banker model. Learn what drove the change in the bank's delivery model and everything that needs to be addressed in a successful universal banker strategy. From change management, communication timing/content to career development strategies, this session will include all the tips and tricks for implementation success.



DEREK BUMRUNGSIRI AVP/DIVISION MANAGER
TWINSTAR CREDIT UNION • LACEY, WA

CREATING A CULTURE OF FUN!

Join Derek as he takes you through an interactive session that is sure to get you moving. Derek will share examples of how he has decreased turnover each year for the past four years. Prepare to explore what you can do to build engagement with your teams, from frontline staff to leaders. Buckle up and be ready to get up on your feet!



KAREY THOMAS SVP BRANCH DELIVERY
AMERICA FIRST CREDIT UNION • OGDEN, UT

MAXIMIZING YOUR TECH-INVESTMENT FOR GROWTH AND SUCCESS

America First Credit Union is currently putting self-assist technology into its locations and measuring efficiency and member adoption with these solutions. With the new branch design, the marketing team has identified a digital marketing strategy that places the brand and products in front of members as they visit locations. This digital marketing strategy along with a focus on retail development has allowed AFCU to better onboard its membership to digital channels and foster long-term relationships.



LEZLIE VEACH CHIEF OPERATING OFFICER
MY COMMUNITY CREDIT UNION • MIDLAND, TX

MORE THAN TRANSACTIONAL

My Community Credit Union's in-store branch in Midland, Texas, is opening as many new member accounts and new checking accounts each month as some of their traditional branches. Lezlie will discuss the strategies and best practices used to make its in-store branch a great source for new members, new checking accounts, and loans. She will share how My Community Credit Union has been able to implement a successful program for their in-store branch to be more than transactional.



STEVE MOUSHON PRINCIPAL
MOUSHON CONSULTING • DALLAS, TX

DON'T WORRY...COACH HAPPY!

Steve builds on earlier presentations and focuses on the art and science of coaching. This interactive discussion provides insights and experiences, as well as shares tools for successfully coaching and developing your team. Be prepared to think differently about how you approach and coach everyone from your superstars to those needing a little extra attention.

A large orange banner with a decorative border of small triangles. On the left is a colorful guitar and on the right are two colorful maracas.

5:00 – 6:30 PM NETWORKING SOCIAL

Before you hit the River Walk for the evening, join us outdoors and poolside to unwind with some fresh air. Enjoy Tex-Mex inspired treats and beverages from the Omni La Mansion's distinguished culinary team. In a relaxed, social setting, meet new friends catch up with old friends, and enjoy live music as we wrap up Day 2!



THURSDAY, APRIL 16

8:00 – 9:00 AM | BREAKFAST BUFFET • 9:00 – 11:30 AM | GENERAL SESSION



MEAGAN JOHNSON GENERATIONAL HUMORIST
JOHNSON TRAINING GROUP • SCOTTSDALE, AZ

ZAP THE GAP: HOW TO RECRUIT ACROSS GENERATIONS

Knowing the strengths of each generation can help you find the candidates who best suit your hiring needs. Employers can benefit from each generation's experience, insight, work ethic, standards of quality and communication styles. We must be learning and evolving to meet the needs of each generation in the workplace! Meagan's presentation will offer real life solutions to take back to your financial institution and put in place immediately. It is time to disentangle your multi-generational frustrations and accomplish Generational Greatness!



MISTIE GILLEN BRANCH MANAGER
NUMERICA CREDIT UNION • SPOKANE VALLEY, WA

EXCUSE ME...IS THIS MY SEAT?

In today's ultra-competitive workplace, professional doubts can creep in as fast as new acronyms are created. Falling into the trap of worrying about your reputation and character can have devastating results to your team and be career-ending. In this presentation, learn simple ways to recognize your value, develop your confidence, and be ready to "grab your seat" of opportunity.



DANNY DELAROSA CHIEF DEVELOPMENT OFFICER
GREATER NEVADA CREDIT UNION • SPARKS, NV

LEADERSHIP THROUGH STRATEGIC PLANNING AND PEOPLE ENGAGEMENT

Danny's values are rooted in his passion for serving people. He leads the organization's strategic planning and analytics, marketing, business development, people engagement, and people development teams to help more people *Live Greater*. In this session, Danny will unpack the importance of having a strategic plan and why a person's engagement plays such an important role in developing that plan.

11:30 AM | CONFERENCE ADJOURNS • LUNCH ON YOUR OWN

POST- CONFERENCE PLANNING WORKSHOP

THURSDAY, APRIL 16
— 1:00 - 4:00 PM —



STEVE MOUSHON

PRINCIPAL
MOUSHON CONSULTING
DALLAS, TX

One featured event is the Post-Conference Planning Workshop. Take advantage of this time to recap the conference and organize your favorite takeaways into a workable and immediate plan of action for your institution's future success. Ask questions, analyze challenges and gain insight from Steve and FSI Consultants as well as other attendees who are in the trenches every day. By participating in informal discussions and brainstorming, discover solutions and ways to implement the best practices shared by conference presenters and to focus specifically on encounters unique to you and your teams

**This complimentary event will require pre-registration. Space is limited.*

OMNI LA MANSION DEL RIO



112 College Street
San Antonio, Texas 78205
phone 1-800-THE-OMNI
www.OmniHotels.com/LaMansion



ROOM RATE

\$185.00 (SINGLE OR DOUBLE)

Group rate extended **3 days prior** to our
conference rates, subject to availability*

Phone 1-800-843-6664

The Omni La Mansion is ideally situated in downtown San Antonio along the historic River Walk and perfectly captures the grace, romance and flavors of the city. It's the perfect destination from which to explore a vast array of area attractions. The 15-mile River Walk also links Spanish colonial missions, museums, public art and the Pearl, a former brewery reborn into an eclectic mix of shops, restaurants and entertainment.

**Note...Fiesta, San Antonio's signature event held April 17-27, is an annual festival with a huge economic impact on the area. The city is anticipating an exciting turnout for this event. Please plan accordingly by booking your rooms as early as possible. Once our block is full, we will not have access to additional rooms or overflow hotel.*

Reservation link available at www.supermarketbank.com



REGISTRATION

Log on to www.supermarketbank.com to register. Members* are allowed one FREE registrant per FSI Member Branch* currently open or planned to be open by August 1, 2021. Additional associates may register at reduced rates.

EARLY BIRD DISCOUNT DEADLINE: MARCH 6, 2020

	<u>Before 3/6</u>	<u>After 3/6</u>
Primary FSI Member* Registration	FREE	FREE
Additional FSI Member* Registration	\$599	\$699
Non-FSI Member Registration	\$1699	\$1899
Leader Summit Registration	\$199	\$299
Guest (meals, breaks, socials only)	\$369	\$419

**An FSI Member is defined as a person working at or with an FSI Member Branch, which is currently open for business, or who has attended FSI Executive Planning. An FSI Member Branch is a branch facility that is currently under a Consulting/Training Agreement with Financial Supermarkets, Inc. Some limitations may apply.*

