

Digital Innovations in Today's Banking Environment

AUGUST 26-27, 2024

HILTON GARDEN INN SIOUX FALLS SOUTH, SIOUX FALLS, S.D.



SDBANKERS
ASSOCIATION

Digital Innovations in Today's Banking Environment

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ABOUT

Technology and innovation have been transforming financial services since long before artificial intelligence and iPhones, and your role as an IT professional is ever-changing, especially in today's environment. The SDBA Digital Innovation's Conference is designed to provide support as you keep on top of technology trends, navigate the business of banking, and build and sustain your bank's technology strategy—all to improve access and better serve your customers. This conference will provide you with an opportunity to learn from industry experts, network with IT colleagues, and visit exhibitors to see and experience the latest in products and services.

ATTIRE

Business casual wear is recommended for all sessions. Meeting room temperatures and personal comfort zones vary. It is recommended you bring a sweater or jacket to ensure your comfort.

LOCATION & HOTEL

Hilton Garden Inn Sioux Falls South | 5300 S Grand Cir, Sioux Falls, SD | 605.444.4500

Ask for a room from the SDBA block to receive the special rate of \$139 per room. The block will be released July 29.

MONDAY, AUGUST 26

5:30 – 6:30pm Happy Hour!

You made it to Sioux Falls! You're checked in, your vehicle is unloaded, you've responded to your emails and dinner plans are made. Now what? Join the SDBA in the lobby for a chance to connect with colleagues, unwind and prepare for a great conference tomorrow!

TUESDAY, AUGUST 27

8:00-8:15am Welcome

8:15-8:55am Artificial Intelligence and the Future of Banking

Patrick Dix, Vice President of Client & Association Engagement, Shazam | Des Moines, IA

BIO: As vice president of client and association engagement, Patrick leads SHAZAM's Speakers Bureau, providing valuable and timely education on issues facing banks and credit unions. Patrick also supports SHAZAM's advocacy efforts at the state and federal level to ensure community financial institutions have a strong voice in the payments industry. Patrick joined SHAZAM as vice president of public relations and has served as vice president of strategic alliances prior to moving to his current role.

SESSION DESCRIPTION: Artificial Intelligence is a topic almost every industry is trying to grapple with. The potential benefits and the uncomfortable challenges AI presents make it hard to think strategically. In this session we'll give you a framework to think about new technologies and innovations like AI and how you might use them in your bank. We'll talk about the ways AI is already in the marketplace, enhancing payments, authentication and the customer experience. We'll also look down the road at the potential risks AI and its uses pose for banking in the future.

8:55-9:25 Data Sharing with Snowflake

John Lehmann, Enterprise Architect, Pathward | Sioux Falls, SD

BIO: John Lehmann is an Enterprise Data Architect at Pathward, based in Sioux Falls, South Dakota. He has architectural responsibilities for defining, designing, and supporting modern Data Platforms, with a focus on Business Intelligence (BI) tools. His work includes methodologies, programs, processes, standards, organization structure, metrics, modeling, and communications to support business growth. John collaborates closely with senior business and technology leadership to drive strategic data programs across the organization, including data strategies and roadmaps.

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SESSION DESCRIPTION: Let's delve into data sharing with Snowflake. In this session, we'll explore data collection practices, Marketplace data sharing, and the nuances of monetizing data. Additionally, we'll discuss the two main types of data sharing: direct and secure. Each type aligns with specific data sharing scenarios, ensuring efficient and controlled access to valuable information. Feel free to ask if you have any further questions!

9:25-9:40am

Solution Showcase

9:40-9:55am

Break

9:55-10:35am

Crafting Exceptional IT Customer Service: A Strategic Guide to Elevate User Experience and Foster Client Satisfaction

Nick Dideriksen, Director of Business Technology, forbinfi | Waterloo, IA

BIO: As Director of Business Technology for forbinfi, Nick is dedicated to empowering people and organizations to excel in the digital age. As a founding member of forbinfi Managed IT, Nick has been instrumental in guiding businesses through the digital landscape, focusing on leveraging technology for innovation and security. He offers practical strategies for adapting to technological changes and cultivating a top-notch work environment.

SESSION DESCRIPTION: To foster better customer service in IT, prioritize a user-centric approach by actively listening to customer needs and concerns. Invest in continuous training for support teams, ensuring they stay informed about the latest technologies and hone their problem-solving skills. Implement proactive solutions, such as predictive analysis, to anticipate and address issues before they impact users, ultimately creating a more responsive and efficient customer service experience.

10:35-10:50am

Solution Showcase

10:50-11:20am

Build vs. Buy – Lessons From One Bank's Commercial LOS Development Journey

Josh Hucul, VP – Lending Technology, ChoiceOne Bank | Sparta, MI

BIO: Josh Hucul is the Vice President of Lending Technology at ChoiceOne Bank, with a career spanning over 15 years in commercial banking. He embarked on his journey as a credit analyst at Wolverine Bank in 2008 and joined ChoiceOne Bank in 2012. His path through the ranks saw him serve as a Commercial Credit Analyst, Vice President Credit Manager in 2013, and Vice President Senior Credit Manager in 2021.

SESSION DESCRIPTION: Using Metriciti, a ChoiceOne Bank built and launched commercial loan origination platform, as a case study. This session discusses the question many banks are asking, 'build or buy?'. The discussion is approached from the business side and goes through the pros and cons, practical tips to be successful, and provides lessons learned from the process, regardless of the route chosen. The session will give attendees valuable insights to bring back to their institution as they encounter new technology initiatives.

11:20-12:00pm

New Technologies in the Financial Services Industry: The Road Ahead

Mark Scholl, Partner, Wipfli | Sterling, IL

BIO: With over 40 years of technology experience, Mark specializes in all aspects of technology services for the firm, primarily in the financial institutions industry, including cybersecurity, IT risk management, and IT training. Mark is a Certified Information Systems Security Professional (CISSP), Certified Information Systems Auditor (CISA), Microsoft Certified Systems Engineer (MCSE), and Certified Ethical Hacker (CEH). In addition, Mark has an internal leadership role as the Illinois market leader, responsible for oversight and growth.

SESSION DESCRIPTION: New technologies have changed the way banks interact with and do business with their customers. In this ever-changing and evolving market, what will be next? Doing nothing is not a strategy. This presentation covers the latest technologies in banking and what the board and executive management need to do to prepare for the future. Gain an understanding of new products and services that are available, the options for outsourcing technology management and cloud computing, and the bank's role for selection and due diligence.

12:00-12:45pm

Lunch

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12:45-1:20pm Tech Talks

SESSION DESCRIPTION: Take part in this past-paces session where you can learn from your colleagues on a variety of tech-related topics. This facilitated session will provide an opportunity to share ideas, ask questions and learn from one another in a fun, relaxed environment.

1:20-1:50pm The Power of AI and Microsoft CoPilot

Abby Hanson, MW Sales Practice Leader, Ingram Micro | Fargo, ND

BIO: Abby Hanson has been in the Microsoft industry for 20 years and at Ingram Micro for four. She leads the MW sales practice and helps partners across the country achieve their modern work growth goals through unique programming. She is passionate about driving strategy around Copilot and AI, Security and Collaboration.

SESSION DESCRIPTION: The power of AI is here. Come and learn how Microsoft 365 Copilot can help increase your productivity and solve business challenges.

1:50 - 2:05pm Solution Showcase

2:05-2:20pm Break

2:20-3:00pm Is it Time To Switch to the Cloud?

Jon Waldman, CISA, CRISC, Partner-Chief People Officer, President SBS Institute | Madison, SD

BIO: Jon Waldman is a co-founder and Executive Vice President of Information Security Consulting for SBS Cyber-Security, as well as SBS' Chief People Officer and the President of the SBS Institute. Over the past 17 years, Jon has helped hundreds of organizations identify and understand cybersecurity risks to allow them to make better and more informed business decisions.

SESSION DESCRIPTION: Many businesses are moving from traditional on-premise networking architectures to cloud-hosted networking solutions. From the best next-gen security controls to more flexibility around remote users and devices, the reasons for exploring cloud-hosted networks are plentiful.

Learn the pros, cons, risks and rewards of cloud-hosted environments, and what you need to know if you're looking to shift to the cloud, including: Today's Cloud Computing Environments, Pros and Cons of moving to the Cloud, Cloud Risk Mitigations, and Must-Have Cloud Configurations and Documentation.

3:00-3:15pm Solution Showcase

3:15-3:30pm Break

3:30-4:15pm This Isn't Going to End Well: Denial and Data and Digital Transformation in Community Banks

William D. Anderson, Chief Operating Officer and EOS(R) Integrator, J. Michael Consulting | Atlanta, GA

BIO: William (Bill) Anderson is an experienced cross-industry executive having held C-Suite positions in health-care, information technology, and marketing. Prior to joining J. Michael Consulting as its Chief Operating Officer and EOS(R) Integrator, he was Chief Customer Experience Officer at the First National Bank in Sioux Falls where he led operations, information technology, facilities, and customer service. He holds PhD and MA degrees from the Ohio State University, a bachelor's degree from the University of Nebraska at Lincoln, and certificates in leadership and banking from the Wharton School and Stonier Graduate School of Banking at the University of Pennsylvania, respectively.

SESSION DESCRIPTION: Community Banks are in an uncomfortable and perilous position: customers expect digital and banking experiences that mirror other consumer experiences they have every day and the reality that providing those experiences is costly, complex, and not easily monetized. Community banks also sit on mountains of data that are being underused, at best, to personalize the customer's digital experience. This session will explore common leadership objections to way and digital investments, discuss how to approach these investments in a thoughtful way, and offer a potential roadmap for community banks to incrementally invest in and realize value from data and digital transformation.

4:15pm

Wrap Up & Adjourn

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REGISTRATION

Fee includes the program, electronic handouts, reception, breaks, and meals.

Member: \$450 per person (includes members of out-of state banking associations)

Non-Member: \$600 per person

After August 16: \$500 for members; \$650 for non-members

Conference Materials: \$35 per one set of printed materials (speaker materials/handouts will be provided electronically for free)

Certificates of Completion will be provided upon request for CE purposes.

Bank _____ Contact Person _____

Address/City/State/Zip _____

Registrants' Names

1. Name _____ Title _____

Address/City/State/Zip _____

Phone _____ Email _____

Attending the Reception on Tuesday, Aug. 26? Yes No Handouts? Yes No

2. Name _____ Title _____

Address/City/State/Zip _____

Phone _____ Email _____

Attending the Reception on Tuesday, Aug. 26? Yes No Handouts? Yes No

3. Name _____ Title _____

Address/City/State/Zip _____

Phone _____ Email _____

Attending the Reception on Tuesday, Aug. 26? Yes No Handouts? Yes No

Submit Registration to South Dakota Bankers Association

Mail: PO Box 1081, Pierre, SD 57501 Fax: 605.224.7835 Email: events@sdba.com Online: www.sdba.com

Number of printed conference materials (\$35 each): _____

Total fees due: \$ _____ Check enclosed Invoice me Credit card (SDBA will call)

Cancellation Policy: 100% refund if canceled August 16 or earlier. 75% refund if canceled August 17-20.

No refund if canceled August 21 or later. Substitutions allowed at any time.

Special Requests: If you have special requests such as dietary or mother's room requests, please contact Halley Lee at hlee@sdba.com or 605.224.1653 by August 16.

Questions: Contact the SDBA at 605.224.1653 or 800.726.7322 or events@sdba.com.

