

Monday, March 12, 2018

2:50PM - 3:50PM

Default Management, Talent Management

Bonnet Creek X

Workforce of the Future

Artificial intelligence, machine learning and other new technologies will impact how financial service companies design the workforce of tomorrow. What will the future look like? Which jobs can be automated? What skills will be in demand? How do we increase efficiency while meeting rising customer expectations? Panelists will consider these questions and discuss how companies are putting new technologies into practice to transform their workforce.

Speaker(s):

David Blake, *Chief Executive Officer*, Degreed

John Jordan, *Managing Director, Head of Consumer Academy and Advisor Development*, Bank of America

Kelly Joscelyne, *Global Chief Talent Officer*, Mastercard

Michael Rochelle, *Principal, Chief Strategy Officer*, Brandon Hall

4:00PM - 5:00PM

Talent Management

Hamilton/Indian River

Workforce of the Future: Roundtable

How is your bank preparing for the future of banking products and services? What is the impact on workforce capabilities? This roundtable session will challenge the participants to focus on these key questions and others raised during the previous session regarding the future of banking and its impact on the workforce. Join us for a lively and informative discussion.

Tuesday, March 13, 2018

9:20AM - 10:20AM

CFPB, Digital Channels, Internal Audit, Risk, Talent Management Bonnet Creek XII

Challenging the Status Quo Through Innovation and Change

"Move fast and break things" may be the unofficial motto of Silicon Valley, but banking isn't so forgiving. Expectations around experience and technology are prompting bank leaders to re-consider their approach to developing and deploying new products, services, and delivery channels. Hear from senior bank

leaders about how they are considering the people, process and systems leading to rapid and disruptive change as well as customer and employee expectations for an individualized experience.

Participants will be able to:

- Discuss how bank leaders are reconsidering their approach to developing new products, services and delivery channels
- Describe how senior bank leaders are responding to customer and employee expectations relative to innovation
- Fields of Study: Management Services, Information Technology

This course is eligible for 1.0 CPE credit

Speaker(s):

John Durrant, *Senior Vice President, Local Consumer Product and Marketing*, Capital One Financial Corporation

Sol Gindi, *Chief Administrative Officer, Chase Consumer Banking*, JPMorgan Chase

Ellen Koebler, *Consumer Lending Solutions Executive*, SunTrust Banks, Inc.

Josh Winstead, *Vice President, Digital Channels Director*, TIAA Bank

10:55AM - 11:55AM

Fair & Responsible Banking, Internal Audit, Risk, Talent Management Bonnet Creek Salon II

A Global Perspective on Sales Practices & Conduct Risk

While little formal regulatory guidance exists around sales practices and conduct risk, expectations are being set through enforcement actions, examinations and evolving industry practices. This session will explore how banks can enhance risk management programs and limit sales practice and conduct risk exposure while still meeting business goals, from both a U.S. and international perspective.

Panelists also will discuss industry best practices for managing sales practice and conduct risks, including emerging approaches to identify, assess, control, monitor, test, and report on conduct risks, fair lending best practices for employee engagement, coaching and sales incentive programs.

Participants will be able to:

- Discuss how banks can enhance risk management programs and limit sales practice while still hitting business goals
- Describe best industry practices for managing sales practice and conduct risks as they relate to the banking industry
- Fields of Study: Management Services, Regulatory Ethics

This course is eligible for 1.0 CPE credit

Speaker(s):

Linda Gallagher, *Managing Director*, Promontory Financial Group, an IBM Company

Kayleen Kohler, *Executive Vice President of Human Resources*, Banner Bank

Matthew Macia, *Managing Director, Bank Chief Risk Officer*, TIAA Bank

1:45PM - 2:45PM

Talent Management

Hamilton/Indian River

Strategic Diversity: Futureproofing the Workforce

Strategic diversity goes beyond traditional paradigms about what "diversity" means and digs into results-driven, quantifiable methods. This panel discussion will provide specific examples of diversity paradigms, lessons learned and success stories. Learn about cutting-edge tools, how to recognize individual strengths and align them with talent and succession planning. Receive an introduction to an "innovation lab" process designed to create tangible results to support corporate strategy.

Speaker(s):

Kayrnnie Bochicchio, *Senior Vice President, Learning and Development, Webster Bank*

Michelle Lee, *President, Community Banking, Eastern Region, Wells Fargo & Company*

Catherine Myers, *Consumer Bank Technology Executive, U.S. Bank*

Neil Rodgers, *Principal, Cole Scott Group*

Tabitha Scott, *Chief Executive Officer, Cole Scott Group*

3:15PM - 4:15PM

Talent Management

Hamilton/Indian River

Reinventing Performance Management

Numerous demographic, societal and technological forces are converging to reshape the modern workplace, workforce and ways of working. Successful transformations rely on a shift in performance management principles. Culture and industry trends influence the speed and level of change when organizations redesign their performance management approach to drive higher levels of performance and engagement. This session will address the primary shifts occurring in performance management today and how to think through embarking on a successful performance management journey for your organization.

Speaker(s):

Eddie Barrett, *Managing Director, Human Capital, Deloitte*

Christopher Cole, *Senior Vice President, Talent Management, KeyBank*

Joan Goodwin, *Manager, Human Capital, Deloitte*

4:25PM - 5:25PM

Talent Management

Hamilton/Indian River

Using Digital Learning to Educate Bank Talent

As rapid change and a continually evolving workforce demand new and different methods of learning, utilization of traditional teaching and learning methods are being challenged. This session will explore alternatives such as micro- and

digital-learning and consider opportunities and scenarios where these learning solutions add value.

Speaker(s):

Sean Deiz, *Senior Manager, Instructional Technology Development*, TD Bank