



04/01/2019 8:15AM - 9:15AM
Small Business, Deep Dive Workshop

Chesapeake G-I

Small Business Financial Exchange: A Comprehensive View of Lending Trends

This session explores current portfolio trends on a macro level with additional insight into regional and business type trends. Attendees will hear from leading industry executives into the drivers of these trends and what your peers see as opportunities and challenges in 2019 and beyond.

Speaker(s):

Carolyn Hardin-Levine, *Chief Executive Officer*, Small Business Financial Exchange, Inc. (SBFE)

Mike Stevens, *Director, Certified Vendor and Data Management*, Small Business Financial Exchange

John Kenefick, *Director, Central Credit Underwriting Senior Vice President*, KeyBank

04/01/2019 12:15PM - 1:30PM
Small Business, Talent Management

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Where to Look NOW: Talent Development & Retention

Banking has not been a “hot industry of choice” for a variety of reasons and many banks are running out of trained bankers. Meanwhile, pressure for higher productivity, faster, and lower costs are significant. All new hires carry an ROI on their heads. Expectations for “performance on quota” after six months in position can lead to significant attrition and an endless loop of new recruiting. How do we balance the cost of investment in training and coaching with the turnover rate we are experiencing? How can we develop business bankers and other sales colleagues faster and retain more of them?

In this session, you will learn:

- Best practices techniques from firms outside of financial services; and
- Example learning acceleration and retention strategies from CBA member banks – strategies for building the talent pipeline, developing team members, and retaining team members.

Attendees of this session may be eligible to earn 1.0 CPE credit in the field of study for Personnel/Human Resources.

Pre-requisites/Advance Preparation: None

Program Level: Basic

Delivery Method: Group Live

In accordance with the standards of the National Registry of CPE Sponsors, credit is granted based on a 50 minute hour.

Speaker(s):

Nick Miller, *President*, Clarity Advantage Corporation
Edmundo Hoffens, *Executive Vice President, Chief Talent Officer*, IBERIABANK
Lynetta Steed, *Senior Vice President*, Fifth Third Bank

Moderator:

Nick Miller, *President*, Clarity Advantage Corporation

04/01/2019 1:40PM - 2:40PM

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Driving the Customer Experience Journey

Today's small business banking customers demand excellence from their financial services provider and expectations are set based on experiences with companies like Amazon, Google and Apple. Convenience, simplicity, access to expertise and absence of problems are high on the list of satisfiers.

In this session, you will learn:

- What drives excellence from the voice of the customer;
- Market intelligence to further the relationship with your customer; and
- Best practices to move your institution further along the journey.

Speaker(s):

Gavin Geraci, *Chief Operating Officer, Business Banking*, PNC
Elizabeth Dobers, *Executive Vice President, Executive Director, Business Banking*, BBVA Compass
Youa Yang, *Digital Banking Program Director*, Barlow Research
Bob Kottler, *Executive Vice President, Director of Retail and Small Business*, IBERIABANK

Moderator:

Youa Yang, *Digital Banking Program Director*, Barlow Research

04/02/2019 9:20AM - 10:20AM

Small Business

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Fintechs & Small Business: Are We Friends Now?

Join our panel of experts to discover how the fintech environment has evolved in today's financial services market.

In this session attendees will learn:

- The value proposition of fintech partnerships;
- The impact they have on the customer experience; and
- The pros and cons of fintech vs. internal approach.

Speaker(s):

Kala Gibson, *Senior Vice President, Head of Business Banking*, Fifth Third Bank
Scott Beyer, *Senior Vice President, Agile Experience Owner*, U.S. Bank
Sam Graziano, *Chief Executive Officer*, Foundation Group
Gary Barker, *Vice President, Senior Product Manager*, Webster Bank

Brian Geary, *General Manager - Bank Partnerships*, ODX

Moderator:

Gary Barker, *Vice President, Senior Product Manager*, Webster Bank

04/02/2019 10:55AM - 11:55AM

Small Business

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Small Business & Regulation: How Fair Lending has Evolved & Where Are We Heading?

Discover how fair lending enforcement developments effect small business banking. Explore the past, present and the NOW of regulations in small business.

In this session you will learn:

- Regulatory trends and direction;
- How banks are ensuring compliance; and
- What you banks should be on the watch for.

Speaker(s):

Jonice Gray Tucker, *Partner*, Buckley LLP

Melissa Stegman, *Senior Policy Counsel*, Center for Responsible Lending

Brian Kreiswirth, *Executive Director and Assistant General Counsel*, Chase Bank

Alan Ellison, *Small Business Program Manager*, CFPB

Brian Larkin, *Senior Director, Associate General Counsel*, Capital One

Moderator:

Jonice Gray Tucker, *Partner*, Buckley

04/02/2019 1:45PM - 2:45PM

Small Business

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Where's All This Going? An Economic Outlook for Small Business

Join us for an industry expert's one-year overview of the state of the small business lending industry.

In this session you will learn:

- Economic trends affecting small business operations;
- Current challenges in the small business lending industry; and
- Where the small business lending industry may be headed.

Speaker(s):

William Dunkelberg, *Chief Economist*, NFIB

04/02/2019 3:15PM - 4:15PM

Digital Channels, Small Business

Chesapeake D-F

TLC for SMBs: Digitizing Small Business Banking

So much focus has been placed on individual customers, it is now time for banks to improve their digital offerings for small businesses.

In this session, you will learn:

- About the lack of digital engagement from small business customers;
- How and why banks need to improve their digital offerings for small businesses; and
- How to develop and execute a strategy to upgrade your small business banking digital suite.

Speaker(s):

Jim Baxley, *Senior Vice President, Enterprise Banking, nCino*

Elizabeth Dobers, *Executive Vice President, Executive Director, Business Banking, BBVA Compass*

Chris Ward, *Small Business Underwriting Executive, Bank of America*

Denise Henn, *Senior Vice President, Group Experience Manager, PNC*

Moderator:

Denise Henn, *Senior Vice President, Group Experience Manager, PNC*

04/02/2019 4:25PM - 5:25PM

Small Business

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Fraud in Small Business: The Time for Solutions is NOW

In this age of technological advancements and increases in organized Crime, financial institutions find it difficult to stay ahead of fraudsters. Criminals cost banks and small business clients billions of dollars each year.

In this session you will learn:

- What strategies fraudsters are using to target small businesses;
- What is next in the cat and mouse game between banks and cyber criminals; and
- What techniques are in place to help protect small businesses from such predators.

Speaker(s):

Todd Schubert, *Senior Vice President, Business Development, EZShield*

Ken Connell, *Executive Vice President, Business Banking Area Manager & Community Markets Director, Huntington*

Terry Roberts, *Founder, President & CEO, WhiteHawk, Inc.*

Jody Thomas, *Vice President of Communications & Marketing, Better Business Bureau of Greater Maryland*

Moderator:

Todd Schubert, *Senior Vice President, Business Development, EZShield*