

Callahan's Retail Roundtable

October 23-24, 2018

Portland, OR

Member Experience

- How do you define? How do you measure?
- Balancing ease of use with security
- Creating consistency across physical and virtual environments
- Evolution of the call center

Inside The Branch

- Is "one size fits all" necessary for branch design?
- Internal branch footprint
- The future of shared branching
- How can branches help drive deposit acquisition efforts?
- Best-practices in designing a new branch

Impact of Technology

- Driving member adoption of self-service technology
- Integrating ITMs and video conferencing
- Scheduling and lobby management
- Use of biometrics
- Lessons learned after conversions

Culture

- Integrating different branches after a merger
- Implementing change – from sales to service or vice versa
- Competing for talent on your employer brand

Roles

- Universal vs. specialized positions
- Creating career paths within the branch environment
- Staffing models with changing technology
- Using workforce management to determine the right staff at the right time
- What new roles will we need in 3 years? 5?

Measuring & Tracking Success

- What are your key retail goals today?
- Tracking behaviors vs. results – service vs. sales
- Technology recommendations – MCIF, Reward systems
- Incentive plan design and implementation

Product & Marketing

- Social media – where should we focus from a branch perspective?
- How are you driving new members in?
- Best-practices in differentiating your brand to combat competition
- Rewards – what are you doing for offers and credit cards?