

# POTENTIAL DISCUSSION TOPICS

- **Branch Design & Technology**
  - Branch Model/Design Evolution – Where is Your CU and Where Do You See it Going?
    - ATMs/Kiosks/Personal Teller Machines/Video Tellers
    - Pods v. Teller Lines
  - Managing Branch Model Transitions with Members
  - Branch Network Plans
  - Branch Traffic Trends/Member Channel Usage
  - Omni-channel - Coordination of virtual & physical channels
  - Queuing & Appointment Scheduling
  - “Training” Members on Channels
- **Personnel Strategies**
  - Staffing: Universal v. Specialization
  - Decision making: Centralized v. Decentralized
  - Managing Branch Model Transitions with Employees
  - Reporting Structure
  - Recruiting & Retention
  - Part-time, Flex-time, Hours Of Operation
  - Training & Professional Development
- **Measuring & Rewarding Success**
  - Philosophy: What Do You Measure?
    - Productivity (transactions) v. Profitability (revenue)
    - Wallet Share v. New Growth
    - NPS, Loyalty Metrics
  - Goal Setting (top down v. bottom up)
  - Compensation: Commissions/Incentives
- **Business Development**
  - Reporting Structure
  - Member Onboarding, Account Activation
  - 2016 Product Focus
  - Cross Selling & Referrals
  - Ancillary Services – Insurance, Investments, etc.
  - Outreach Activities
  - Relationship Pricing
- **Other**
  - Contact Center Technology
  - Contact Center Metrics
  - Shared Branching
  - Enterprise Risk Management – Impact on Branches
- **Anything else you’d like to add?**