

Session	Description	Speaker
Registration & Networking	Join Temenos and our partners for breakfast and networking.	
Opening Remarks	Temenos keynote session.	Dallan McManus, EVP Product, Temenos
Temenos Origination & Collections Update	Join this session to hear the latest Temenos product developments and get a glimpse into what is planned for the future.	Kris Frantzen, Product Manager, Temenos
Journey Manager	Explore innovative technologies that optimize customer experience, improve loyalty and accelerate new business growth and get a glimpse into what is planned for the future.	Chris Woolridge, Global Go-to-Market Lead, Temenos
Accelerate Innovation Using SaaS	This session will discuss the resiliency, efficiency, security and scalability benefits of moving to cloud and the continuous positive impact to financial institutions.	Corey Bowlby, Head of SaaS for Americas, Temenos
Customer Success Panel	Discover how Temenos credit union customers are leveraging technology to deliver better member and employee experiences.	Enrique O'Reilly, Americas Head of Customer Success & Support, Temenos
Temenos Credit Union Benchmark	The Credit Union Benchmark Program provides our clients with tangible, data-driven insights into their business performance. This session will provide more details about the program, metrics and actionable outcomes.	Vincent Chamasrour, Customer Value Director Americas, Temenos

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Keynote: Fraud & Industry Insights from Experian, Equifax & TransUnion	The session will provide a state of the market view from the industry's top 3 Credit Bureaus, giving insights into fraud and digital transformation and will address fraud concerns and bureau topics our mutual customers may have for their members and account holders.	Brandy Harrison, Director, Customer Analytics Solution Delivery, Fraud Solutions, Equifax Sean Flynn, Senior Director, Community Financial Institutions, TransUnion Experian: TBD
Art of the Possible with APIs	The open APIs are a centerpiece of the openness and flexibility the Origination and Collection modules provide customers and partners. We'll discuss and demonstrate how customers and Temenos leverage these tools to bring to life the "art of the possible".	Bill Jones, Principal Technical Architect, Temenos
Compliance Hot Topics & Trends	We will discuss the latest compliance hot topics and trends that are impacting credit unions.	Greg Sawyers, Senior Vice President Compliance, Temenos
What's New in Support!	We will review the improvements made in support delivery, reporting and communication! We are "Back to the Basics"! Additional highlights will focus on what's coming in the next 6 months to improve customer experience.	Kim Hubbard, Senior Vice President Support, Temenos
The Accutive approach to overcoming obstacles on the journey to implementation	One of Accutive's project leads will provide a firsthand account of how Accutive designs and executes Journey Manager projects to maximize quality and minimize defects from the first sprints. Learn how Accutive leverages a quality-first approach to dodge pitfalls and pave a smooth path to your go live.	Neil Vany, Project Implementation Lead, Accutive

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Speed Dating		
API use cases	Discussion of API solutions that are available to you and will allow you to better serve your members.	Bill Jones, Principal Technical Architect, Temenos Nicki Luz, Head of Delivery, Temenos
Industry Trends	In this roundtable, we'll discuss the latest industry trends. Bring your perspective and questions.	Kris Frantzen, BSG Manager, Temenos Jasna Hadzi-Tosev, Senior BSG Consultant, Temenos
Moving to Cloud	Join this session to learn more about transitioning to a cloud environment. Bring your questions!	Corey Bowlby, Head of SaaS for Americas, Temenos
Connectors & Third-Party Integration	We'll discuss integrations available, how to get started, and what the process is for Temenos to evaluate and onboard new integrations and vendors via our API or pre-built solutions.	Regina Saylor, Regional Partner Manager, Temenos Dennis Wasilewski, VP Product Management, Temenos
Is anybody doing "this" in Collections?	Collaborate and share! Show us how you leverage the collections system in a unique way to work for you.	Robert Davis, Senior Product Consultant, Temenos Steve Dunleavy, Senior Business Analyst, Temenos
Is anybody doing "this" in Origination?	Collaborate and share! Show us how you leverage the origination system in a unique way to work for you.	Diana Laufer, Team Lead, Lending Consultants, Temenos Chantel Lamberson, Team Lead, Temenos
Journey Manager	Share how you're looking to optimize your member journeys and how others have improved conversion rate and seamless onboarding.	Chris Howell, VP, BSG, Temenos Nirmal Solanki, VP, BSG, Temenos
Temenos Value Benchmark	How can TVB help you refine your credit union's strategy and achieve its goals.	Vincent Chamasrour, Customer Value Director Americas, Temenos
Trends in Compliance	Bring your questions around compliance topics.	Greg Sawyers, Senior Vice President Compliance, T

Credit Union Fall Forum

October 24-25, 2023 – Afternoon Breakouts



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Bolster Your Automated Decisioning	Learn how to put Temenos's robust decisioning engine to work to automate loan and account decisioning. This will also include an overview of the portfolio simulator, where customers can use real application data for data analysis and comparison of decisioning factors.	Dave Ehrlich, Senior Product Consultant, Temenos
Collection Business Rules	Learn how Rules can help you to apply analytics to your collection activities. The Temenos team details how Rules are a supercharger for your collection system, making it faster, more powerful and more efficient.	Andy Pavlik, Senior Product Consultant, Temenos Shana Goldson, Team Lead, Collections Consultants, Temenos
Upgrade to Cloud	Deep dive into the resiliency, efficiency, security and scalability benefits of moving to Cloud and the continuous positive impact to financial institutions	Corey Bowlby, Head of SaaS for Americas, Temenos
Optimize Cross-sell & Counter-Offers	In this session you'll learn how to more effectively cross-sell to your members and customers, customizing the pitches they receive and the decisioning process. You'll also learn how to better automate counteroffers based on specific scenarios. Offers can be customized to work based on multiple pieces of criteria.	Eric Meader, Senior Product Consultant, Temenos Morgan Kennedy, Senior Product Consultant, Temenos
Collection Workspace Efficiencies	Learn how to optimize your productivity with these handy tips and tricks on customizing the Workspace. You'll learn how to apply new functionalities to your existing systems and receive a wealth of knowledge from the Temenos team.	Robert Davis, Senior Product Consultant, Temenos
Take your Member Experience to the Next Level	Join this session to take a deeper drive on how you can manage your branding, products and features through configuration at your fingertips. Optimize your member journeys to improve conversion rate and onboard seamlessly into Temenos loan origination platform in seconds.	Chris Howell, VP, Business Solutions Group, Temenos Nirmal Solanki, VP, Business Solutions Group, Temenos

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Getting the Most From Origination Business Rules	Learn from one of our most experienced consultants on just how business rules can optimize your processes. See a few proven scenarios that provided solutions to clients as we walk you through configuring the rules.	Eric Meader, Senior Product Consultant, Temenos
Best Practices for Admins	Join us for an in-depth exploration of Temenos Collections and Origination System administration, where you'll learn proven techniques for efficient oversight, from setup to peak performance and security. Equip IT admins with essential tools and strategies for streamlined operations, covering data management, maintenance, security, and more, to maximize the solution value and reliability.	Manish Thukral, SVP, Customer Support, Temenos
Optimizing Document Performance	Curious how to automate document processing and archival? In this session we will discuss the best ways to leverage this functionality and how to ensure this process is as hands off as possible.	Diana Laufer, Senior Product Consultant, Temenos
Collections Cases	Unlock the potential of Cases for streamlining processes. Find out how Cases will allow you to integrate every collection process into a single system.	Robert Davis, Senior Product Consultant, Temenos Andy Pavlik, Senior Product Consultant, Temenos
Discover API and Events Architecture That Puts Customers First	Discussion and see a demonstration of API solutions that are available to you and will allow you to better serve your members.	Bill Jones, Principal Technical Architect, Temenos