



Meet the Strategic Seven

10th Annual CUNA Technology Council Summit
August 3-6 • San Diego, CA



CELEBRATING 10 YEARS OF BRINGING TECHNOLOGY EXCELLENCE TO CREDIT UNIONS

The Strategic Seven

The New Business Strategy Facilitators. Meet them at the 10th Annual CUNA Technology Council Summit.

To reflect this new focus, the Technology Council has developed seven business-enabled strategies including:

- Member convenience
- Web fulfillment
- Member information security
- Sales management
- System integration
- Network infrastructure management
- Multichannel convergence

Supporting these grand strategies are a series of innovative workshops and sessions scheduled at San Diego's Grand Hyatt. Today's credit union member is demanding easier access and better service now. Join your peers and explore your changing role in exceeding member expectations.

For a complete agenda and to register, visit:
www.cunatechnologycouncil.org



Pre-Conference Workshop II

Getting Projects Done Faster and Better

Karla Norwood, President
and Jim Cardwell, CEO,
Cardwell Group, Westlake, OH

Strategy today is implemented

by a series of ongoing projects. Successful implementation requires maintaining the threads of corporate strategy throughout all projects.

Many credit unions are disappointed with their project management efforts —

with missed deadlines, wasted time, and misspent money. This pre-conference workshop on project management helps you learn how to meet project deadlines 30% faster, get multiple hours back per week/per manager, and get higher-quality completed projects. You'll walk away with a project framework that's easy for the entire credit union to embrace — with handouts and tools to use with your department — or to share with the entire credit union.

You will also learn how to:

- prioritize projects
- develop a project business case
- develop the project charter/plan
- develop the project deliverables
- handle project content and knowledge management
- prepare for and run project meetings

Register for this pre-conference workshop and find out how all of these elements can easily work together to achieve better project results and outcomes!

Pre-Conference Workshop I

Facing the Threats Head On (Or is that Facing the Threats and Keeping Your Head On?)

Rick Fleming, CIO,
Digital Defense,
San Antonio, TX

This three-hour session will explore network and information security from a systematic approach that will help you understand what building blocks are available, what the weaknesses are in those blocks, how to put them together into an effective solution, and what to do should the worse happen.

Fleming will discuss current threats such as phishing and pharming attacks, and identify what the credit union can do to minimize their impact. You'll be challenged to "put on the black hat" and see how the bad guys see your network.

This refreshing perspective will help you secure your credit union's networks, while helping you gain understanding on how and why those bent on gaining unauthorized access to your networks succeed all too often.



Keynote Session

From the Computer Room to the Board Room: The Emerging Technology Strategist



Ron Nice

Ron Nice,
President/CEO,
Nice Enterprises,
Evergreen, CO

"The technologist's role has grown from installing and maintaining 'cool tools' to becoming an effective developer, leader, and implementer of credit union

strategy," says Nice. From his keynote session, you will gain the knowledge and understanding of why the credit union environment has changed and your function has shifted, how you can play an effective leadership role in your organization, and gain the inspiration you need to become your organization's key strategy implementer.

Nice has worked in, or consulted with, credit unions for over 27 years and has extensive experience and success in helping credit unions build brighter futures, stronger teams, and better organizations.

He is President and CEO of Nice Enterprises, Inc., which provides strategic, business, scenario, and innovation planning, leadership development, and teambuilding consultation and facilitation to progressive credit unions throughout North America.

Closing Session

Using Technology as a Facilitator of Business Strategy: How Technology is Helping the Navy SEALs Fight the War on Terrorism



Bruce Wilhite

Bruce Wilhite,
Retired Navy SEAL,
Program Manager, Special Programs,
Extreme Arts & Sciences, Eugene, OR

Several years ago Naval Special Warfare (Navy SEALs) began an initiative to find ways to be relevant in the 21st Century. Since the beginning of Desert Storm, there has been a Revolution in Military Affairs (RAM) stemming from the

dramatic changes in technology, operational methods, and command organizations. This revolution has captured the imagination of warriors and analysts alike, and is driving the military toward a more efficient system with an emphasis on leveraging technology as a force multiplier.

The past few years have been a time to look toward the future of Naval Special Warfare and develop a plan that keeps the Navy SEAL relevant across the spectrum of conflict around the world — a plan that improves combat efficiency while staying within the current organizational framework — a plan that makes the best use of technology, its talented people, and superb training. In short, a plan that is both revolutionary and achievable.

The plan presented in this session is the culmination of nine years of extensive analysis, reflection, and commitment. The result is a combat fighting system (Navy SEAL) that is unparalleled in the world.

General Session

Getting to the Core: A Panel Discussion About the Current and Future Strategies of Core Processing Systems

Join us in this general session to hear from four core processors on their short-term product design plans and their focus on future design/architecture. We'll have representatives from Summit, Symitar, Users, and EPL on this interactive panel discussion. We'll also give attendees a chance to ask questions of the panel.

If you are researching potential core processor partners, in the middle of a core processor search, or trying to plan a future core processor strategy, this session is a must!



What To Expect From This Conference

Because we want you to walk away with information you can use back at your credit union, we've teamed up our breakout sessions and peer-to-peer interactives. Each day's morning sessions will give you insight into a strategic technology such as conveniences services, then in the afternoon you will hear a credit union's experience with implementing and using the technology. Specifically you will have the opportunity to learn:

- How Purdue Employees CU employs **timesaving member services technologies**
- How Mountain America CU maximizes their call center using **multi-channel convergence**
- How First Technology CU fights the threats of **ID theft, phishing, and spyware**
- How Power 1 CU **manages and protects their network**
- How San Diego County CU **integrates their telephone and computer systems (CTI)**

In addition, you will the opportunity to hear technology sessions from Cisco Systems, Berbee Information, COWW Systems, Deluxe Inc., Summit, Symitar, EPL, Gartner Group, Digital Defense, Andera, Inc., plus many more.

If you're wondering *How to Choose Emerging Technologies*, you'll want to attend the general session by Warner Schlais, SVP/CIO, Deluxe Corporation, and Carl Claunch, VP Research & Advisory Services, Gartner, Inc.

Back by popular demand! The Best Practices general session is a great opportunity to learn what your peers are doing in their credit unions.

Whether you wear a management hat, a technology hat, a strategy hat, or possibly all three hats at your credit union, this conference will help you figure out how technology can meet the business needs of your organization. You can be part of the answer and not the question!

Visit www.cunatechnologycouncil.org to view the full conference agenda.



• Social Event

Join us as we board trolleys and travel to Old Town San Diego. Once there, you'll enjoy a free hour to wander through the quaint shops or take time to have a margarita or two. We will then reboard our trolleys and travel to Casa Guadalajara for an enjoyable Mexican buffet in an open courtyard setting. You will have plenty of time to network and get to know some of your fellow conference attendees.

Pricing for this event is included in your conference registration (guests may join you for a fee).

Conference Information

Hotel Information

Manchester Grand Hyatt
One Market Place
San Diego, CA 92101
www.manchestergrand.hyatt.com

Phone: 800-233-1234 (reservations)
619-232-1234 (guest phone)
Fax: 619-233-6464 (guest fax)

Hotel Reservations

You will need to make your hotel reservations directly with the Manchester Grand Hyatt by calling 800-233-1234 by Friday, July 1, 2005 to guarantee a room. Room rates for the conference are \$205 single/double, plus applicable taxes and resort fee. Remember, to guarantee a room, you must make your reservation directly with the hotel.

Save with Council Membership!

Current members of the CUNA Technology Council and those that join prior to the 2005 CUNA Technology Council Summit will receive a discount on the already low registration fees. Members who register by the early bird deadline of July 1, 2005, will pay just \$699 (non-members pay \$899). Member registrations postmarked by July 1, 2005 will pay a pre-conference workshop fee of just \$119 (non-members pay \$169).

Refund Policy

Cancellations received in writing (via fax 608-231-4327) 30 or more days before the start of the conference are eligible for a refund of the amount paid minus a \$75 administrative fee. No refunds will be granted if cancellation is received 30 days or less before the conference begins. Substitutions are accepted anytime prior to the start of the conference at no additional cost. Simply fax an updated registration form, listing the new participant and who they will be replacing.

Tax Exemption Information

Federal credit unions may or may not receive an exemption from state and local sales taxes on their hotel rooms. Contact the hotel directly for more information.

San Diego Area Sights

If you would like more information on the San Diego area, visit www.sandiego.org

Registration Information

DiAnne Stamn, Registrar
Credit Union National Association
800-356-9655, ext. 4387
Fax: 608-231-4327
dstamn@cuna.coop

To register for the Summit, and to view the full agenda, visit www.cunatechnologycouncil.org

Transportation

The San Diego International Airport (Lindbergh Field) is approximately 3 miles from the Manchester Grand Hyatt. Transportation, to and from the hotel, is available via taxi or shuttle service. Please check in the baggage claim area of the airport.

Airline Discounts

Discounted airfare is available for conference participants through United Airlines. Contact United at 800-521-4041 and provide discount code 553SF.

Climate

Average climate for August in San Diego is daytime highs in the upper 70s, cooling to around 67 degrees in the evening.

Conference Attire

Attire for the conference is business casual.





P.O. Box 431
Madison, WI 53701-0431

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strategies on the horizon.
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