

## **2017 Signature User Group Session Descriptions**

### ***Deposits:***

**Deposit Fiserv Update** – This will be an interactive session with Fiserv team members to discuss future Signature release enhancements related to the CIF and deposit systems. There will be an opportunity to ask related questions pertaining to system functionality and future enhancements. This is also an excellent opportunity to share your ideas and thoughts on the future of Signature

**Deposit Roundtable** – Please join the Deposit Committee members and end users for an interactive and user driven session to discuss topics, ideas, issues and solutions from YOU, the Signature Users. Discussion topics will be solicited from users prior to the conference and at the Product Network Meeting on Sunday. Please bring any topics that are near and dear to you as your fellow users may have the same issues and a creative solution or strategy to share. This is your opportunity to discuss pain points, enhancements, strategies and solutions with your fellow Signature users. We will also discuss current and potential BID projects. If you are looking for support on a BID you have submitted or are working to submit, this session is a great way to seek support for your project.

**Rising Rate Environment** – The banking industry, consumers and businesses are anxiously awaiting a rising rate environment. The current low interest rate environment is an exception to historical norms. With recent movement in the Fed Funds rate and additional increases projected for 2017, it is critical that FIs look at outlining strategies related to awareness of competition, products and pricing options to serve as opportunities to grow and retain customers along with providing flexible plans that can be priced according to funding needs and market competition.

**RPA Strategies for Commercial Customers** - Interested in learning more about leveraging commercial pricing, fee exceptions and waivers? We will explore how some banks are using pricing exceptions, delayed start dates, in-plan and out-of-plan fees, and other RPA features to better service their commercial account base. We will also hear about a project plan to convert out-of-plan fees to in-plan. Join us for this interactive session to hear more about the flexible features of RPA and how to manage pricing plans without giving away the bank.

**RPA Reward Strategies.**

## ***Loans:***

**Loan Fiserv Update** – Fiserv will present a Signature release update and a preview of future enhancements. Join us to learn about new features that are expected to be part of the upcoming releases. After the update, a roundtable discussion will begin based on feedback from the user group.

**User Bank Challenges and Opportunities Discussion** – The Fiserv loan user group compiled a list of challenges and opportunities over the past year. This session will be a great opportunity for banks to discuss the challenges and possibly network with other banks who may have overcome those challenges, etc.

**Loan Roundtable** – Join us to discuss any feedback from the Fiserv update, including questions about future enhancements. The group will also have a roundtable discussion about current challenges, future needs, and industry trends and regulations that are driving change in the lending world.

**Year-end Processing Best Practices and Challenges** – Join us for a panel discussion to talk about the process on topics including how users handle backdated payments into prior year, what year-end extract file is used to produce the year-end statements, how banks handle the property address flag exceptions... There will also be updates on two new BIDs related to year-end processing.

**Non-Accrual Chargeoff Project** – Join the panel discussion with client banks and Fiserv about the ongoing Non-accrual/Chargeoff project. We will discuss current developments for the project and prioritize future developments that will transform our non-accrual/chargeoff processing.

## ***Risk & Business Intelligence:***

**Signature Release and Alert Testing** - Join us for a discussion on the approach institutions are taking to test Fiserv releases and alerts. Topics include: impact assessments, overall process management, compliance monitoring, resource determination, and documentation.

**Fraud Hot Topics** - Join us in this discussion on best practices for combating the latest fraud trends including cyber fraud. This session will cover the latest cyber trends and discuss what can be done about it. Learn how trends are evolving and how we need to proactively address.

**Data Warehouse Best Practices - Trending, Archiving, Performance & Efficiency Issues** - Join us in this round table discussion led by fellow bankers and Fiserv representatives. Anticipate discussions related to optimizing performance, mapping user defined fields, and documentation in general. This is a panel discussion and we welcome your input and any questions you may bring with you.

## ***Self Services:***

**Self Services Fiserv Update** - Hear from Fiserv representatives as they discuss their roadmap as well as many products and services that are currently already available to your FI.

**Intelligent Customer Communication** - Understanding how self-services devices are communicating with customers is critical and this information allows banks to engage with customers on a one-to-one level, personalizing the transactions. Customers expect more from all self-services channels and banks need to be gearing their channels toward the tech savvy user. Banks need to be prepared to present offers to consumer that are relevant to their personal needs, so let's dive in and see how your bank can improve the customer experience.

**Instant Card Issuance – Panel Discussion** - Hear from peer banks on their experiences with Instant Debit Card Issuance. Explore the various integrations that are already in place that make these products more user friendly for branch staff. Also discover how these peer banks have implemented this solution in their own way, paving the way for other banks to modify their existing Instant Issue experience or develop a truly dynamic card issuance program from the ground up.

**The Emerging Role of Social Media in the Self Service, Banking Channels** - Social media continues to grow exponentially every year. Explore how other banks are utilizing various social media channels to reach new audiences, increase awareness of products and interact with customers on a new playing field. Also see how social media campaigns and contests are helping banks reach new customers while continuing to reinforce the company's brand message to its existing clients.

## ***Architecture:***

**Endpoint Management** - Manage your PC's more effectively with fewer resources while maintaining both security and usability.

**Web Enabling your Systems – Communicator Advantage and ESF** - Panel discussion and Fiserv update on Communicator/ESF. utilizing the new ESF SDK to web enable legacy systems.

**Data is \$ - Supporting the Business with a multi-source Data Warehouse** - Centralize all your data sources to build a reporting engine to support management and regulatory reporting in a repeatable and sustainable manner.  
Main Topics:

**Efficiency through Workflow Automation** - Give Nautilus a Power Up by supercharging it with data from other systems. Drive workflows to take the guesswork out of ongoing processes.

### ***Branch Services:***

**Branch Services Fiserv Update** - Fiserv Product Management will provide product updates for Aperio Sales, Connected Teller and EnAct. Hear about the work done this year and enhancements targeted for next releases.

**Branch Services** - Join our roundtable discussions from ideas submitted by you the users. The ideas, issues, and solutions discussed in this session are submitted by the user group. We have great monthly User Group calls and this is an opportunity to continue those informative discussions. This is a great way to get information about issues you may have and the creative solutions others have found.

**Introduction to Connected Teller** - An introduction to the next generation teller platform, including lessons learned by banks that have converted from Desktop Teller to Connected Teller. You will come away with a basic understanding of the features and functionality of the Connected Teller platform.

**DocPlus 101** - An introduction to DocPlus, which is the engine that enables you to generate, print and distribute customized documents. DocPlus is required for Aperio, but can be used for notices without Aperio.

**Getting the Most out of Nautilus Using App Enabler** - In this session you'll learn how to use Nautilus app enabler to pull information from nautilus in other platforms.

### ***International:***

**Transfer Order**

**Insurance on Collateral through Document Tracking**

**DocPlus Fiserv Application**

**Mobile Banking**

**Challenges of Large System Integration Projects with Current and New Systems Architectures**

***More session descriptions to come!***