



**SEVENTH ANNUAL
CUNA OPERATIONS,
SALES & SERVICE
COUNCIL CONFERENCE**

Integrated harmony



**SEPTEMBER 26-29, 2004
HILTON NEW ORLEANS RIVERSIDE • NEW ORLEANS, LA**

Service



Learn how to strike the right chord with your members at the seventh annual CUNA Operations, Sales & Service Council Conference. Coming to the Big Easy will give you the insight to help you bridge the gap between member service and bottom line profitability. The Conference's varied mix of workshops and general sessions on topics covering negotiations, productivity, investment services and more is set against the rhythms of old New Orleans. It will jazz up your credit union's strategic thinking and provide a unique perspective on member service. There's time to catch a streetcar for a ride back in time to the Garden district... or experience the uniqueness of the French Quarter. It all comes together this September at the OpSS Conference in New Orleans. Register today!



...the strategic link to

Preconference Workshops

Win-Win Negotiation Skills

Dr. Dugas partners with successful executives, managers and teams, assisting them in assessing needs to achieve maximum performance. A member of the International Coach Federation, Dr. Dugas received her doctoral degree in Human Resources and Workplace Development from Louisiana State University. Her workshop will identify key elements and characteristics of collaborative, win-win negotiation. You'll learn the four forces at play in every negotiation, identify roles and behaviors for individuals and teams in the conflict cycle. You'll learn your own personal conflict "fall back" style and identify barriers to cooperation for individuals and teams.



Sandra Bernard Dugas, Ph.D.
Professional Executive Coach,
Dynamic Adventures



You've never had a preconference workshop like this. You'll be immersed in sessions that challenge your mind, body, and soul. You'll gain insight into working with and motivating high

performance teams and strengthen your problem-solving and crisis management skills.

Once on board, participation in all Xtreme Team activities is a requirement and all activities are geared to the participants' abilities. The Xtreme Team has its first meeting on Sunday afternoon from 1:00 to 5:00 p.m. All other Xtreme Team learning activities have been scheduled outside of regular conference hours as an added dimension to your conference experience. *Registration is limited to 30 people.*

Opening General Session

Generations of Members

Dynamic speaker Jason Dias shares new insights on providing quality member service that meets the needs of members from all generations. After experiencing his interactive session filled with best practices, new ideas, and workable solutions, you'll change the way you think about member service. His presentation will provide you with new insights on providing quality member service to your members of all ages.



Jason Dias
Trainer & Consultant

Jason is a nationally recognized speaker, consultant and facilitator in the areas of generational marketing and management. His speaking style is candid, direct and has been uniformly praised by credit unions across the country for his ability to inform and inspire.



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Four breakout sessions and two mini-workshops will provide tools for addressing current challenges at your credit union.

BREAKOUT SESSIONS

BRANCH PRODUCTIVITY

Mike Scott, CEO and President, Financial Management Solutions, Inc.

Find out how to monitor, increase, and enhance your branches' contribution to your credit union's bottom line. You'll walk away from this session with some great how-to's that you can use back at your credit union.

COMPLIANCE – CHECK 21

Todd Shery, Attorney, Edwards & Shery, P.A.

What does this new regulation mean for your credit union? How will it impact your day-to-day operations? Explore the implications of this new regulation with an expert!

CREDIT UNION ROBBERY: WHAT TO DO BEFORE, DURING AND AFTER

Joseph Shapiro, President, Shapiro & Associates

Learn what to do before, during, and after a robbery from the nation's top robbery prevention specialist. This is one session you don't want to miss!

USA PATRIOT ACT

Todd Shery, Attorney, Edwards & Shery, P.A.

Continue your compliance training with another session on a new regulation. You'll learn what to be prepared for as the Patriot Act matures.

MINI-WORKSHOPS

SIX SIGMA QUALITY IMPROVEMENT, PROJECT MANAGEMENT

Carolyn Murray, Managing Consultant at the customer for the customer, Genworth Financial (Formerly GE Mortgage Insurance), Raleigh, NC

This presentation will provide you with proven practices by a best in class organization in effectively reviewing operating processes to achieve excellence in member service.

MEASURING SERVICE QUALITY

Greg Wills, Director of Business Development, Prime Performance, Inc., Lakewood, CO

Member satisfaction is of paramount importance. Given that what gets measured gets accomplished, this session will provide a number of practical alternatives in measuring your members' perception of your organization.

General Sessions

Strategic Thinking for Quality-Focused Organizations

Ron Nice has worked with credit unions for over 20 years and has extensive experience in the "for profit" and "not-for-profit" worlds. He'll show you current data on how credit unions are performing compared to our competition. In follow-up sessions Ron will help you develop a strategic action plan for your credit union.



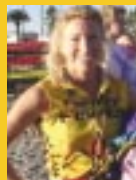
Ron Nice,
Nice
Enterprises

Ron is president and CEO of Nice Enterprises which provides strategic, business, and scenario planning, teambuilding, consultation and facilitation to progressive businesses and credit unions in North America. Ron will work with attendees for the entire morning session on Tuesday. Ron's General Session titled, *Strategic Thinking for a Quality Focused Organization* will be followed by his session on *Best Practices/Strategic Drivers* where he will provide feedback on individual credit unions' best practices.

Closing General Session

Facing the Extremes: Getting Excited About Operational Chaos

If you think you've had a BAD day at your credit union, you'll want to hear Juli Lynch tell you what a "rough day" is really like. Juli was the only woman on an all-male Eco-Challenge Team made up of Navy Seals. For the past 15 years Juli has facilitated change processes for a long list of organizations — from Fortune 500 companies to small businesses. She will share her experiences as a competitor in multi-day, multi-sport races and show how the lessons learned can benefit you and your credit union.



Juli Lynch, Ph.D.
Turning Pointe
Consulting

Juli brings to her clients a passion for experiences that guide organizations, teams and individuals toward realization of their potential. Juli has competed in grueling, ultra-distance races such as the RAID Gauloises, and ESPN Extreme Games. She has skied 400 km across Finland and won the 2004 USA North American 24-hour Solo Ski Race.

Juli will be the leader of the Xtreme Team Preconference Workshop on Sunday with subsequent meetings outside of regular conference activities.

Here's a noteworthy agenda that



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SEPTEMBER 26-29, 2004
HILTON NEW ORLEANS RIVERSIDE
NEW ORLEANS, LA

SUNDAY, SEPTEMBER 26

11:00 a.m. - 1:00 p.m.
PRECONFERENCE
WORKSHOPS
REGISTRATION

1:00 - 5:00 p.m.
**PRECONFERENCE
WORKSHOPS**

1. Win-Win Negotiation Skills

- Sandra Bernard Dugas, Ph.D.
Professional Executive Coach,
Dynamic Adventures

2. Xtreme Team

- Juli Lynch, President,
Turning Pointe Consulting,
Lake Mills, WI
- Tom Decker, Director,
Executive Development, CUNA,
Madison, WI

*(Additional Xtreme Team activities
have been scheduled outside of
regular conference hours.)*

4:00 - 6:00 p.m.
GENERAL CONFERENCE
REGISTRATION

6:00 - 7:30 p.m.
WELCOME RECEPTION
Watch boat, barge and
occasional ocean-going cruise
ships on the Mississippi River
from the Mark Twain Terrace of
the Hilton Riverside. This is an
excellent opportunity to meet
old friends and get to know the
first-time attendees.

MONDAY, SEPTEMBER 27

7:00 – 9:00 a.m.
REGISTRATION

7:00 - 8:00 a.m.
CONTINENTAL BREAKFAST

8:00 - 8:15 a.m.

WELCOME

- Vicki Smith, Chief Member Relations
Officer, Rogue FCU, Medford, OR
Chair – OpSS Council Executive Committee

8:15 - 10:15 a.m.

OPENING GENERAL SESSION

Generations of Members

- Jason Dias, Trainer-Historian-Consultant,
Generational Marketing and Management, New
Braunfels, TX

10:15 – 10:30 a.m.
NETWORKING BREAK

10:30 a.m. - 11:30 a.m.

Environmental Overview

- Bob Lawhead, CEO/President,
Raddon Financial Group, Oakbrook Terrace, IL

11:30 a.m. - 1:00 p.m.
SPONSOR SHOWCASE

11:45 a.m. - 1:00 p.m.
MEMBERSHIP LUNCHEON
(Open to all attendees)

1:00 - 2:15 p.m.

BREAKOUT SESSIONS

1. Branch Productivity

- Mike Scott, CEO/President,
Financial Management Solutions, Inc.,
Atlanta, GA

2. Credit Union Robbery:

What to do Before, During and After

- Joseph Shapiro, President,
Shapiro & Associates, Maple Valley, WA

3. Compliance – Check 21

This session will not be repeated.

- Todd Sherpy, Attorney,
Edwards & Sherpy, P.A., Columbia, SC

2:15 - 2:30 p.m.
NETWORKING BREAK

2:30 - 3:45 p.m.

BREAKOUT SESSIONS

(1 & 2 Repeat)

3. Compliance - The Patriot Act

- Todd Sherpy, Attorney,
Edwards & Sherpy, P.A., Columbia, SC

3:45 - 5:00 p.m.
SPONSOR SHOWCASE

will reignite your passion for operations, sales and service.

TUESDAY, SEPTEMBER 28

7:00 - 8:00 a.m.
SPONSOR SHOWCASE

7:30 - 8:00 a.m.
CONTINENTAL BREAKFAST

8:00 - 10:00 a.m.

GENERAL SESSION

**Strategic Thinking for a
Quality-Focused Organization**

- Ron Nice, President, Nice Enterprises, Evergreen, CO

10:00 - 10:15 a.m.
NETWORKING BREAK

10:15 - 11:15 a.m.

Best Practices/Table Groups/Strategic Drivers

- Ron Nice, President, Nice Enterprises, Evergreen, CO

11:15 a.m. - 12:00 p.m.

Debrief

- Ron Nice, President, Nice Enterprises, Evergreen, CO

12:00 - 1:15 p.m.
NETWORKING LUNCHEON

1:15 - 3:15 p.m.

MINI WORKSHOPS

**1. Six Sigma Quality Improvement,
Project Management**

- Carolyn Murray, Managing Consultant at the Customer for the Customer, Genworth Financial (Formerly GE Mortgage Insurance), Raleigh, NC

2. Measuring Service Quality

- Greg Wills, Director of Business Development, Prime Performance, Inc., Lakewood, CO
- Tom Hoscheidt, VP, Raddon Financial Services, Oakbrook Terrace, IL

SOCIAL EVENT

7:00 - 8:00 p.m.
Board the Cajun Queen Paddle Wheel Boat

8:00 - 10:00 p.m.
Reception and Dinner Cruise
on the Cajun Queen

Networking at its Best!

Join your fellow participants for an evening of fun as we set sail down the mighty Mississippi River on the Cajun Queen docked next to the Hilton Riverside. Enjoy dinner and drinks along with an opportunity to network with your peers in the Bayou Room. Explore the Promenade Level while viewing downtown New Orleans as the boat pulls away from the wharf for a leisurely cruise. Guests may join us for this event for an additional fee.

WEDNESDAY, SEPTEMBER 29

7:30 - 8:30 a.m.
SPONSOR SHOWCASE

8:00 - 8:30 a.m.
CONTINENTAL BREAKFAST

8:30 - 9:45 a.m.

GENERAL SESSION

Implementing Check

Cashing Services

- Lois Kitsch, Director of Special Projects, Filene Institute, Madison, WI

9:45 - 10:00 a.m.
NETWORKING BREAK

10:00 - 11:00 a.m.

Investment & Insurance Services

A Case Study for a CUSO.

- Leonard (Lennie) Gzesh, VP/COO, Kinecta Financial and Insurance Services, Manhattan Beach, CA

11:00 - Noon

CLOSING GENERAL SESSION

Facing the Extremes: Getting

Excited About Operational Chaos

- Juli Lynch, Ph.D., President, Turning Pointe Consulting, Lake Mills, WI





Additional conference information

Hotel Information

Hilton New Orleans Riverside
2 Poydras Street
New Orleans, LA 70140
1-800 HILTONS
or 504-584-3999
Fax: 504-568-1721

Hotel Reservations

You will need to make your hotel reservation directly with the Hilton New Orleans Riverside before August 26, 2004 to guarantee a room. Room rates for the conference are \$165 Single, \$189 Double per night plus applicable taxes and \$3.00 per person per night. **Remember to guarantee a room you must make your reservation directly with the hotel.**

Transportation

The New Orleans International Airport is 13 miles (20 minutes) from downtown New Orleans. Shuttle and taxi service are readily available. One-way taxi fares are \$28.00 from the airport to the Central Business District for one or two persons and \$12.00 (per passenger) for three or more passengers. Pick-up is on the lower level, outside the baggage claim area. Airport Shuttle service to downtown hotels leaves every 15 minutes. One-way fares are \$13.

Airline Carrier

Discounted airfare is available for conference participants through United Airlines, the official airline of the 2004 CUNA Operations, Sales and Service Council Conference. Contact United Airlines at 800-521-4041 and provide discount code 553SF.

Climate

New Orleans is the best in the fall. Temperatures average 84 degrees during the day and 67 degrees at night. You will want to bring a sweater or jacket with you, as all meeting rooms are air-conditioned.

Conference Attire

Dress for the conference is business casual.

Refund Policy

Refunds will be issued until August 27, 2004, minus a \$75 administrative fee. No refunds will be available after this date, but substitutions will be accepted any time. All cancellations and substitutions must be submitted in writing. Non-members substituting for Council members will not be eligible for the member discount. For more information, call us at 800-356-9655, ext. 4074.

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.

Registration Information

Kevin Stamn, Registrar
Credit Union National Association
800-356-9655, ext. 4074
Fax: 608-231-4327
E-mail: kstamn@cuna.coop

Register online at
www.cunaopsscouncil.org

Program Information

Teresa Steele
CUNA Councils Program
Coordinator
800-356-9655, ext. 4047
e-mail: tsteele@cuna.coop

Save with Council Membership

You can save money two ways when you register for the Conference.

1. Council members save \$250 compared to the non-member rate, so it pays to join the Council before you register for the conference.
2. Registering before August 27 will save you \$100 over the regular conference rate and \$30 on your pre-conference workshop registration.

Continuing Professional Education (CPE) Credits

CUNA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CEP Sponsors, 150 Fourth Avenue North, Nashville, TN 37219-2417. Telephone: 615-880-4200.

Web site:
www.nasba.org.

**You can earn
4 CPE credit
hours for the
preconference
workshop and 18 CPE
credit hours for the CUNA
Operations, Sales & Service
Council Conference.**





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Registration Form

Please complete one form per registrant. Type or print all information.
Photocopy for multiple registrations.



Register Online: Log on to our secured Web site at www.cunaopsscouncil.org to register via credit card.

Fax: With credit card info to: **608-231-4327**

Mail: Credit Union National Association, P.O. Box 78546, Milwaukee, WI 53278-0546

Legal name: _____

Name preferred on badge: _____

Title: _____

CU/organization name: _____

CU/organization mailing address: _____

City: _____ State: _____ Zip: _____

Daytime phone number: _____ Fax: _____

E-mail address: _____

Check here if you have a disability that requires special services. Please describe: _____

In case of emergency, please contact (required):

Day contact: _____ Phone: _____

Night contact: _____ Phone: _____

Payment and Fees

Conference (OPSLA04)

	Postmarked before August 27, 2004	Postmarked after August 27, 2004
OpSS Council Member	<input type="checkbox"/> \$799	<input type="checkbox"/> \$899
Non-Council Member	<input type="checkbox"/> \$1,049	<input type="checkbox"/> \$1,149

Preconference Workshop (Registration for Conference is required for attendance at workshop.)

OpSS Council Member	<input type="checkbox"/> \$150	<input type="checkbox"/> \$180
Non-Member	<input type="checkbox"/> \$175	<input type="checkbox"/> \$205

I will be attending the following preconference workshop (choose one):

Win-Win Negotiating Skills

Xtreme Team (Participation limited to 30 people; registrants will be required to participate in all Xtreme Team activities.)

Are you a first-time attendee? YES NO

Social Event (Free for attendees)

YES, I'll be attending the Cajun Queen Cruise social event on September 28

YES, I'll be bringing a spouse/guest to the social event

_____ x \$75 per guest \$ _____

Total enclosed: \$ _____

Current members of CUNA Operations, Sales & Service Council, and those who join prior to the 2004 Conference, will receive a discount on the conference registration fees. To join, visit www.cunaopsscouncil.org.

Payment Method (Payment must accompany your registration.)

Check/share draft enclosed (Payable to Credit Union National Association, Inc.)

Charge my credit card VISA MasterCard

Card account number: _____ / _____ / _____ / _____ Expiration date: _____

Signature: _____

Print name as it appears on card: _____

CUNA/League Affiliated?

Yes No (Please note: Affiliation with CUNA/League is required for attendance, but limited exceptions may apply. Please contact the program coordinator prior to making travel arrangements to confirm eligibility.)

For office use only:
Customer # _____
Comp. # _____
Authorization # _____
Order # _____



Credit Union National Association
P.O. Box 431
Madison, WI 53701-0431

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