

DAY 1 AGENDA

DAY 2 AGENDA

Monday, March 16

12:00pm - 2:00pm

Registration, Buffet Lunch & Partners Showcase

2:00pm - 2:30pm

Welcome, Sponsor Recognition & Event Kickoff

EJ Kritz, CXO, DBSI

2:30pm - 3:00pm

Transformation Defined

Leslie Higgison, Retail & Financial Services Executive

3:00pm - 3:30pm

Panel Discussion: Data-Driven Design

Tom Long

Founder & Principal, The Long Group

Josephine Moran

President & CEO, Ledyard Bank

Jacque Valdez

SVP, Operations & Member Experience, GECU

Aimée Sundstrom

Director, Member Expansion, Elevations Credit Union

3:30pm - 3:45pm

Break

3:45pm - 4:00pm

Sponsor Recognition

Jason Sletten, Senior Transformation Strategist, DBSI

4:00pm - 4:45pm

From Transactions to Trust: The Art of Connection in Retail Financial Spaces

Christina Bailey, Chief Growth Officer, ArtLifting

4:45pm - 5:00pm

Kinective: Shuttle Sponsor Remarks

5:00pm - 5:45pm

Shuttle Departure and Arrival

Arizona Financial Credit Union - Biltmore Branch

5:45pm - 6:00pm

Arizona Financial Credit Union: Welcome Remarks

6:15pm - 6:30pm

Branch Keynote: Jim Marous

Co-Publisher, The Financial Brand & Banking Transformed Podcast Host

6:30pm - 7:00pm

Dinner, Open Bar & Branch Tours

7:45pm

Shuttle Departure to Crowne Plaza Resort Phoenix-Chandler

Tuesday, March 17

8:00am

Shuttle Departs Crowne Plaza Resort for DBSI's Ideation Center

8:00am - 9:00am

Registration & Donut Truck

9:00am - 9:10am

DBSI Day 2 Welcome

EJ Kritz, CXO, DBSI

9:10am - 9:30am

Building a Culture of Transformation

Ryan Zilker, EVP, Chief Growth Officer, Sound Credit Union

9:30am - 10:00am

Fireside Chat: The Secret to Branch Transformation is Workforce Optimization

Robyn Breshears

Executive Dir., Sales, Service & Support, Arvest Bank

Carla Trombly

SVP of Banking Transformation, DBSI

10:00am - 10:30am

Rebrand Revolution

Kristin Ronca, First VP, Dir. of Brand & Growth Strategy, TruMark Financial CU

10:30am - 11:00am

Break & Partners Showcase

11:00am - 11:45am

UNC Student Spotlight: Gen-Z to Gen-Alpha: The Future of Banking is Here Today

Shiva Rajbhandari

President of the Carolina Credit Union Initiative

Sarah Galdi

VP of the Carolina Credit Union Initiative

11:45am - 12:00pm

Tyfone: Lunch Sponsor Remarks

12:00pm - 1:00pm

Lunch & Partners Showcase

1:00pm - 2:30pm

Build-A-Branch Design Lab

Hosted by DBSI's Design Team

2:30pm - 3:15pm

Turning Locality into Branch Strategy: Winning the Localization Battle

Corey Wrinn

Managing Director, Rivel Banking Research

Kalyn Dennis

VP of Marketing & Communications, Wilson Bank & Trust

Mark Beausoleil

EVP, Head of Retail Banking, Valley Bank

3:15pm - 3:30pm

Break

3:30pm - 4:00pm

Steal This Idea Roundtable

Hosted by DBSI's Transformation Strategists

4:00pm - 4:45pm

Featured Keynote: Marbue Brown

Former Managing Director of CX at Chase

4:45pm - 5:00pm

Closing Remarks

5:00pm - 6:00pm

Bar Opens & Dinner

6:00pm - 8:00pm

Cocktails & Conversations

8:00pm

Shuttle Departs for Crowne Plaza Resort Phoenix-Chandler

