



2023 Mid-South User Group

2023 Annual Meeting Agenda
 Nashville, TN
 The Virgin Hotel
 October 17-19, 2023

Monday - October 16, 2023 (Pre-Conference)		
Time	Event	Location
Pre-Conference Activity		
5:30 PM - 7:30 PM	TBD	Hotel Lobby
	Pre-Registration Required	
Tuesday - October 17, 2023		
Time	Event	Location
Registration		
7:00 AM - 8:00 AM	Registration	TBD
7:00 AM - 8:00 AM	Breakfast	TBD
Morning Training Sessions		
8:00 AM - 12:00PM	Morning Training Sessions	
Please note there will be a break from 9:30 - 10:00		
Option 1 - Loan Training - Brent Reynolds, Peak Consulting, LLC		TBD
Non-Accrual/Charge-Off/Shadow Loan Accounting		
In this session we'll discuss why loans go into Non-Accrual/Charge off & the results of those transactions to the GL.		
We'll also review Shadow Loan Accounting, its advantages, and how it can be fully automated. There are many complexities to this subject so come with your questions and we'll dig into it together		
Interest Methods, Payment Processing, and Associated Specs		
We'll discuss how the different Interest Methods work and what loans they are commonly associated with. We'll review payment processing best practices and the specs that impact payment billing/splits. We'll also discuss how product specifications impact loan function and if used properly how it improves accuracy/efficiency.		
Option 2 - Deposit Training - Debbie Dunkerson, Fourth Capital Bank		TBD
Anatomy of Deposit Specifications		
General Specs vs Class Specs		
Service Charge Specs vs Credit Back Specs		
RRM		
Deposits		
Premier Analysis - The Basics		
EIM - NSF Charges vs Decision Plans		
Account Maintenances/Balances		
Q & A		
Option 3 - CyberSecurity - Bruce Upton, Stone Bank		TBD
TBD		
Option 4 - Business Analytics, Phil Boon, Peak Consulting, LLC		TBD
Building a Report Using the Premier Data Warehouse (PDW)		
Already have PDW but not sure where to start? Interest in PDW but wanting to know more? Learn how to leverage the Premier Data Warehouse to create reports showing changes over time. We will also discuss combining data from multiple areas such as FMS and Integrated Teller.		
5.1 Basic and Advanced Functions		
Whether looking to create a basic report, learn how to leverage Master-Detail relationships, or build Join and Union queries, this session is for you! We will cover some of the basic and advanced features of Business Analytics 5.1.		
12:00 PM - 1:00 PM	Lunch	TBD

Afternoon Training Sessions

1:00 PM - 4:00 PM | Afternoon Training Sessions

Please note there will be a break from 2:30PM - 3:00PM

Option 1 - Loan Training - Brent Reynolds, Peak Consulting, LLC

TBD

Loan Coding, Integration, and Roundtable Questions

In this session we'll go through an overview of loan coding. We'll discuss what should be at the Loan Level, Line Level and Collateral Level. We'll also review how integration works and how it can be optimized so there are not hundreds of tables. We'll take some time at the end of this session to go through some round table questions.

Participation Loans

In this session we'll go through Bought Parts, Sold Parts, and Serviced Parts. What are the differences? How do we optimize them on the system. We'll dig into the best practices and some of the common myths around how these work.

Option 2 - BPM- Amanda Davis, Bank OZK

TBD

New Accounts/Account Revision

Adding procedures/policy hyperlinks for frontline to assist bankers

Add on services within the workflow check ordering, my change keeper, automatic transfers, direct deposit authorization form, business online enrollment

Hard stops for bankers to reroute users when you identify an exception - Automated Transitions/User Prompted Transitions

How to make actions work for you!!

Display Messages; E-Mail Message; Display HTML Message; Launch Application (VerfaFin, internal sites, etc)

Maintenance Services

Closing account and Hot Card with Instant Reissue Services (one stop shop)

COD Change Request - Renewals

Address Changes - Form conditioning to eliminate dual entry

Business Online Enrollment

Open Discussion - Questions about BPM

Bring your laptops and Live Examples

Option 3 - Workflow Automation - Andy Newton, The Peoples Bank of SC

The Intranet

The foundation of your business automation. Learn how Office 365 can and easily give you a professional looking and functional place to being your business process automation journey. Lists, views, and security all work together.

Examples of Business Process Automation

Get a glimpse into the process that have been automated and the benefits gained at The People's Bank of South Carolina. Processes like Employee On/Off Boarding, Loan Maintenance Requests, Debit Card Maintenance Requests, EAP Invoice Approvals, Exception Tracking, and more.

The Tools

There are many forms and workflow tools available. Why did we choose the tools we selected.

Forms Creation

How a forms tool can quickly help you design user friendly forms for your bank and be dynamic based on your needs, security roles, and dynamic data.

Workflow Creation

Get a behind the scenes view into workflow construction and some best practices. Your processes are unique, and workflows can be created to match your needs.

User Consoles

See how User Consoles are created in SharePoint and used by the end users and how it helps organize their tasks from all the apps created.

Reporting on Workflows

Learn how SharePoint can give you reports on your business process and how design is important when wanting a sound report in the end.

Questions and Answers

Option 4 - RPA - Phil Boon, Peak Consulting, LLC

Industry Trends and Best Practices in Nintex RPA LE (Foxtrot)

Interested in learning what trends we are seeing in the automation space of the banking industry? In this session, we will discuss which projects banks have been prioritizing, additional automation use-cases, and our best practices when it comes to writing Botflows in Nintex RPA LE (Foxtrot).

Creating a Workflow Using Nintex Automation Cloud

This session will focus on automating a customer feedback workflow utilizing Nintex Automation Cloud. We'll talk use-cases, connectivity to external systems such as SharePoint or Salesforce, and API capabilities.