



# 2017 DocuMatix User Conference

January 18 - 20, 2017

Aria Hotel & Resort  
Las Vegas, Nevada

\$248/night - 1/17 - 1/18

\$196/night - 1/19

Hotel & Resort Fee

\*\$169

Conference Registration

\*Seating is Limited  
Register Today



## Conference Speakers



Anne Legg  
Keynote Speaker



Shelby Coleman  
Fresno County FCU



Julie Goe  
Clark County CU



Ollie Moore  
Delta Community CU



Jenna Taubel  
First Alliance CU



Audra Wilder  
GE Credit Union



Bill Dodds  
Westerra Credit Union



Mandy DeHate  
Visions FCU



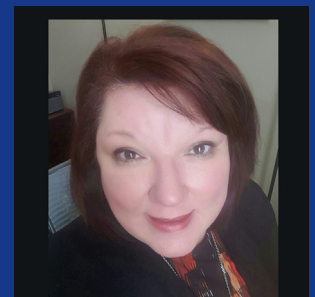
Jessica Stetson  
Space Coast CU



Sarah Cecchin  
1st United Credit Union



Melissa Wilhelm  
CoVantage CU



Delynn Byars  
First South Financial CU

Register at [www.documatix.com](http://www.documatix.com) or 877.362.8628

## About the Speakers



**Anne Legg**  
**Founder**  
**THRIVE Strategic Services**

She is a recognized credit union industry expert, veteran and thought leader with an MBA thesis on the credit union business model as well as two internationally published whitepapers on credit union business strategy. Anne's experience in big data coupled with a growth strategy has resulted in one client experiencing the highest loan volume in recorded history of its credit union.

She has also served on various Credit Union Boards including; CUNA's Marketing and Business Development Executive Council, MAC, and the California and Nevada Credit Union League Public Advocacy Committee. In addition, Anne instructs at the CUNA Marketing School and has acted as the subject matter expert for CUNA's Credit Union marketing curriculum. She has also been a **contributing author to CUNA's Environmental Scan**, the Credit Union industry's leading strategic planning guide.

She has received numerous awards including; **CMBDC Marketing Professional of the Year**, Credit Union Executive Society **Rising 100**, **CO-OP ThinkPrize** semi-finalist (2012). She has also been named "**A Woman to Watch**" by the Credit Union Times. Her work has been published and presented at both the **2012** and **2014 International Cooperative Summit**, making her the only Credit Union professional in the United States to do so.

She is a graduate of University of Iowa and holds Masters in Business Administration with an emphasis in Marketing from National University, San Diego. Her master's thesis was the CUNA CFO Council contest winner (2011), was released as a CUNA white paper in July 2011, and was selected by the 2012 International Cooperative Summit for publication and presentation.



**Shelby Coleman**  
**Graphic Designer**  
**Fresno County Federal Credit Union**

Shelby Coleman has worked in the credit union industry for over 20 years, starting with her first teller position at 18 years old. She started her career with the Credit Union nine years ago as a temp for the VP of Marketing and Membership while she was on maternity leave and stayed on after the VP's return, as the Marketing Specialist. Two years ago Shelby became the onsite Graphic Designer for the Credit Union in addition to her Marketing Specialist duties. Shelby's current duties include all branch promotions and merchandising, social media maintenance, all member communications, and credit union event planning. Shelby's goal is to pass on her love of the credit union experience to her community with fun and engaging promotions that celebrate the values that credit union membership embodies.

### **About Fresno County Federal Credit Union**

Fresno County Federal Credit Union is a SEG based institution located in Fresno, CA, in the heart of the Central Valley, and has experienced impressive double digit growth over the last ten years. Fresno County Federal Credit Union has been a leader among credit unions regarding their member service goals, with a consistent 94 net promoter score. Their goal is to serve the membership with compassion, and their scores show the results! The Credit Union has become one of Fresno's leading credit unions serving more than 80,000 members with eight full-service branches and more than \$640 million in assets!

## About the Speakers



**Julie Goe**  
**Marketing Coordinator**  
**Clark County Credit Union**

Julie Goe, Marketing Coordinator, has worked at Clark County Credit Union for more than ten years, serving the marketing department for the last two. Her experience from her previous positions in sales and customer service has given her the knowledge of frontline staff and member mentality. This, combined with her BSBA from University of Nevada, Las Vegas, made her fall in love with marketing and member engagement. Her current position allows her to write copy for internal and external communications; manage social media, email marketing and video displays; and coordinate with other departments on special projects.

**About Clark County Credit Union**

Since 1951 CCCU has provided financial products and services to its members in Clark County, Nevada. This includes Henderson, Las Vegas, North Las Vegas and surrounding areas. CCCU serves 40,000 members and has over \$620 million in assets. For more information, visit [cculv.org](http://cculv.org).



**Ollie Moore**  
**Team Leader, Product Marketing**  
**Delta Community Credit Union**

Ollie Moore is an accomplished marketing and communications professional with more than 15 years of experience in the financial services industry. He serves as Team Leader of Product Marketing at Delta Community, Georgia's largest credit union and one of the top 25 credit unions in the nation.

Since joining Delta Community in 2009, Ollie has supported successful marketing campaigns to promote member acquisition, retention and referral. He has a special interest in online and mobile banking and works closely with Delta Community's Remote Delivery Channels team. Additionally, Ollie facilitates communications with Delta Community employees and its more than 340,000 members.

A passionate advocate for community service and volunteerism, Ollie commits his personal time to several charitable organizations including Hands On Atlanta, the Make a Wish Foundation-Greater Atlanta, Furniture Bank of Metro Atlanta and Nicholas House, which provides shelter and education to homeless families. He serves on the Delta Community Philanthropic Fund committee and as a Military Academy Mentor.

Ollie is a member of the American Marketing Association and holds a Bachelor of Arts degree in Journalism from Delaware State University.

**About Delta Community Credit Union**

With more than 342,000 members and assets exceeding \$5 billion, Delta Community Credit Union ([www.DeltaCommunityCU.com](http://www.DeltaCommunityCU.com)) is the largest credit union in Georgia and the 23rd largest in the United States. Founded in 1940 by employees of Delta Air Lines, the Credit Union now welcomes residents of 11 metro Atlanta counties and employees of more than 150 businesses, including Chick-fil-A, RaceTrac and UPS. In addition to 23 metro Atlanta branch locations and three out-of-state locations, Delta Community serves members with its robust online and mobile banking platforms and a team of more than 100 professionals in its Member Care Center.

## About the Speakers



**Jenna Taubel**  
**Marketing Coordinator**  
**First Alliance Credit Union**

Jenna Taubel has been the Marketing Coordinator for First Alliance Credit Union for three years. She is a Marketing Department of one, which means she gets to be creative, solve problems, and strategize on a daily basis. Jenna has been integral in helping shape the credit union's digital strategy efforts, and has spearheaded a number of new digital initiatives for the credit union, including SEO/SEM, designing and developing the credit union's social media strategy, enhancements to the credit unions mobile banking application, online lending and online account opening products and processes. In her few short years with the credit union she has played an important role on various teams for several large projects, including a core processor conversion, total credit union rebrand, and currently a complete website redesign. Jenna graduated Magna Cum Laude from Winona State University in Minnesota with a Bachelor of Science Degree in Business Administration. She intends to continue her education and pursue a Master's Degree.

### **About First Alliance Credit Union**

Chartered in 1932, First Alliance Credit Union is the original credit union to Rochester, MN and was begun as a resource to help city employees during the Great Depression. Today, First Alliance has evolved to become an important financial resource for five counties in South East Minnesota. First Alliance has just over \$160 million in assets and serves 13,600 members. The First Alliance tagline, "All for One", communicates a promise that ALL we do is FOR every ONE of our members.



**Audra Wilder**  
**Vice President Marketing**  
**GE Credit Union**

Audra Wilder is the Vice President of Marketing for GE Credit Union. Audra has over 10 years' experience marketing for GECU and over 20 in Marketing and Branding. As part of Senior Management, Audra oversees all of marketing including internal and member communications, website and mobile applications, brand awareness, media planning, data analysis, and oh so much more.... With a passion for strategic planning and a killer member experience, Audra (and The BA Group) have placed a large focus on designing and fully intergrading an automated onboarding program and targeted email marketing initiatives.

### **About GE Credit Union**

Formed in 1940, the then named General Electric Code Wire Federal Credit Union was founded in Bridgeport, CT and served 123 members in their first year. Today the Milford, CT based full-service credit union serves companies including Lockheed Martin, SUBWAY and Medtronic, as well as several underserved markets. With more than 26,000 members and \$200 million in assets GE Credit Unions' tagline says it all "Your money. Your dreams. Our commitment."



**Bill Dodds**  
**Director of Business Intelligence & Data**  
**Westerra Credit Union**

Bill Dodds, Director of Business Intelligence and Data, has worked at Westerra Credit Union for over one year. Bill has over 20 years of experience working with numerous financial and marketing organizations. Bill has lectured at several universities on various aspects of business intelligence and marketing innovation and has been a speaker at various CUNA events. Bill is an expert with integrating data throughout the enterprise to create innovative analytics and marketing initiatives that can be leveraged throughout the Westerra Credit Union enterprise. Bill and his team are responsible for improving all aspects of the member experience at Westerra.

### **About Westerra Credit Union**

Organized in 1934 by Denver Public Schools (DPS) teachers, Westerra has been in business for over 80 years. Between 2005 and 2009, four Denver metropolitan credit unions merged together; Denver Public Schools, Jeffco Public Schools, Safeway grocery store and the City of Aurora community (former military) credit unions to form Westerra. With \$1.4 Billion in assets and 106,000 members, Westerra serves members within seven counties around the greater Denver metropolitan area. For more information, visit [www.westerracu.com](http://www.westerracu.com).

## About the Speakers



**Mandy DeHate**  
**AVP Marketing**  
**Visions Federal Credit Union**

Mandy has worked at Visions Federal Credit Union for over 14 years. Her credit union experience started on the teller line and quickly moved to the Marketing Dept. where she held the roles of analyst, assistant, and manager. Working in her true passion of marketing is a dream come true and she enjoys the surprises that unfold each day. In her role she is responsible for marketing all products/services, public relations, social media, reputation risk, e-mail marketing, and brand management, all while managing her own team and working closely with an advertising agency. She has a bachelor's degree in Advertising from Ferris State University, located in Big Rapids, MI and will always be a Michigander at heart.

### **About Visions Federal Credit Union**

Visions Federal Credit Union is headquartered in Endwell, NY (home of the 2016 Little League World Series Champions!). Founded as an IBM employees credit union in 1966, Visions now serves over 180,000 members with 45 locations spread across New York, New Jersey, and Pennsylvania. Visions has traditional locations along with three in-school branches, and one more on the way. Asset size is in the \$3.5 billion range and we boast over 500 employees who are highly engaged in the organization and intent on "Making Visions Matter" each and every day.



**Jessica Stetson**  
**Marketing Manager**  
**Space Coast Credit Union**

Jessica Stetson is the Marketing Manager for Space Coast Credit Union, where she has been working for the last four years. She has a Bachelor's Degree from Wittenberg University and over 7 years of experience in Marketing and Communications. In her current position, she has embraced the opportunity to engage members across traditional and digital media, synchronize brand management with public relations and social networks, and leverage data and marketing automation to drive results. She develops the strategy for the SCCU's website and member reviews program and introduced content marketing and lead nurturing to elevate the credit union's marketing campaigns. She attributes her passion and success in Marketing to her continuous development and her ability to navigate the dynamic world of marketing and communications, always relying on her analytical and design skills.

### **About Space Coast Credit Union**

Space Coast Credit Union was chartered in 1951 and is headquartered in Melbourne, Florida. The credit union serves more than 300,000 members with assets of over \$3.7 billion through a network of 58 branches and over 100 ATMs located throughout Florida and through its website, SCCU.com. Space Coast Credit Union is open for membership to anyone who lives or works in the fourteen Florida counties it serves. Locations can be found at [SCCU.com/locations](http://SCCU.com/locations).



**Sarah Cecchin**  
**Senior Vice President, Marketing & Communications**  
**1st United Credit Union**

Sarah has been in the credit union industry for nearly 20 years, most recently as the Senior Vice President of Marketing and Communications at 1st United Credit Union. Leading the DocuMatix client base in questions and service calls for eight years, Sarah is still hard at work designing a highly intelligent, data focused, set-it and forget-it approach to automated email marketing.

### **About 1st United Credit Union**

It doesn't get more friendly and welcoming than 1st United Credit Union. Thriving in the highly competitive San Francisco Bay Area, we pride ourselves on delivering a fast, tech-savvy experience, without sacrificing personal one-on-one service. We believe in local, neighborly banking and hope you will too.

## About the Speakers



**Melissa Wilhelm**  
**Online Marketing Specialist**  
**CoVantage Credit Union**

Melissa Wilhelm has worked at CoVantage Credit Union for nine years, serving as the Online Marketing Specialist at CoVantage for the last seven. Her current position allows her to write copy for internal and external communications; manage social media, online, and traditional marketing; dabble in graphic and web design; assist in development of online and mobile banking platforms; and plan community fundraising events.

Melissa holds a bachelor's degree from University of Northwestern – St Paul.

**About CoVantage Credit Union**

CoVantage Credit Union is based in Antigo, Wisconsin and serves a community charter in northern Wisconsin and two counties in upper Michigan. CoVantage has grown significantly since they came into business in 1953 and currently stands at \$1.4 billion dollars in assets, over 90,000 members, and 340 employees.



**Delynn Byars**  
**Senior Vice President, Marketing**  
**First South Financial Credit Union**

Delynn has been with First South Financial for just over 20 years, starting her career with the credit union as its first official Business Development officer. From there she has worked her way up and around in the credit union including turns managing the call center and the mortgage department. She was promoted to Senior Vice President of Marketing in 2004 and holds that position today. She oversees all aspects of First South Financial's internal and external marketing and advertising.

Delynn holds a master's degree from the University of Memphis and is also an adjunct professor for the University of Phoenix.

**About First South Financial Credit Union**

First South Financial was founded in 1957 and is based in Memphis, Tennessee. It serves several counties in Western Tennessee and Northern Mississippi. It has 16 banking centers, approximately \$520 million in assets and 110 employees.