



# 2017 DocuMatix User Conference



**January 18 - 20, 2017**

**Aria Hotel and 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

Register at  
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**Conference Agenda**

## Wednesday, January 18, 2017

7:30am - 8:30am Registration, Registration Desk 2A

Meeting Room: Starvine 1&2

7:30am - 8:30am Breakfast

8:30am - 9:00am Training: Web Form Emails

9:00am - 9:30am Training: Module Integration

9:30am - 10:00am Training: Reports

10:00am - 10:15am Break

10:15am - 11:15am Training: DocuMatix On Demand - Onboarding you to DOD

11:15am - 11:30am Break

11:30am - 12:30pm Training: Newsletters and Articles

12:30pm - 2:00pm Lunch / Networking Break

Meeting Room: Bristlecone Ballroom 1&2

2:00pm - 2:45pm Mandy DeHate, AVP Marketing, Visions Federal Credit Union



Mandy will discuss the importance of highly targeted e-mails and how BIG data can bring BIG success. Using internal data that all credit unions have access to, Mandy will show how an auto refinance, mortgage refinance, credit card usage, and skip-a-pay e-mail can help drive new business. Enhancing the member relationship using DocuMatix is easier than you think.

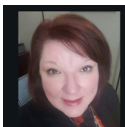
2:45pm - 3:15pm Jenna Taubel, Marketing Coordinator, First Alliance Credit Union



As a Marketing Department of one, Jenna will share some of the ways she gets creative with the DocuMatix Product Suite (email manager, surveys, web forms), plus she will share how implementing DocuMatix On Demand brought First Alliance's email marketing strategy to the next level.

3:15pm - 3:30pm Break

3:30pm - 4:00pm Delynn Byars, Sr. VP, Marketing, First South Financial Credit Union



Tracking. ROI. Member feedback. Compliance. It would appear that they are completely unrelated; however, at First South Financial they have one common thread – DocuMatix. Delynn will walk us through the simple and effective solutions the credit union devised to help with each of these areas that have had a meaningful impact on all of these areas. There will be lots of how-to information along with results and a preview of some ways they intend to use DocuMatix going forward.

4:00pm - 4:45pm Ollie Moore, Product Marketing Team Leader, Delta Community Credit Union



Ollie's presentation will cover how Delta Community is "Using it all" by making the most of DocuMatix's many functions for marketing, customer communication and employee engagement. A longstanding DocuMatix client, Delta Community has enjoyed success by actively using DocuMatix for email marketing campaigns, member surveys, event registrations, referral promotions, on-demand email communications, web forms and more. Ollie will also share tips for using DocuMatix to accurately track, measure and compare completed campaigns.

Meeting Room: Bristlecone Ballroom 1&2

6:30pm - 8:30pm Social

## Thursday, January 19, 2017

7:30am - 8:30am Registration, Registration Desk 2A

8:00am - 8:45am Breakfast, Bristlecone Ballroom 1&2

Meeting Room: Bristlecone Ballroom 6

8:45am - 9:00am DocuMatix Welcome / Introductions

9:00am - 10:00am Anne Legg, Founder, Thrive Strategic Services



Keynote Speaker

10:00am - 10:45am

Melissa Wilhelm, Online Marketing Specialist, CoVantage Credit Union



Melissa will present the various ways they utilize DocuMatix, including how they use available tools for both member and staff applications. Highlights will include using the ways they utilize DocuMatix to stay compliant when communicating important information to both staff and members. Melissa will also offer an update on the unique e-Statement enrollment process she shared at last year's conference.

10:45am - 11:15am

Break / Networking, Bristlecone Ballroom 1&2

11:15am - 12:00pm

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



Bill will present how the Westerra marketing team is connecting DocuMatix data and results with other business units across the Westerra enterprise. His presentation will focus on the board and senior executive leadership perspective to better understand, value and measure how various DocuMatix results, such as open rates and click-through rates, when integrated with data from other business units, translate into measurable member outcomes and overall enterprise credit union performance improvement. Bill will explain how valuable data coming back from DocuMatix supports multiple business unit and membership goals throughout Westerra Credit Union.

12:00pm - 1:00pm

Lunch, Bristlecone Ballroom 1&2

1:00pm - 1:45pm

Shelby Coleman, Graphic Designer, Fresno County Federal Credit Union



We all have those projects. The ones that pop up as we are in a meeting trying to figure out a way to wrap up everybody's goals in that nice, neat little package. It could be a targeted group of members that your VP's desperately want to reach. It could be a need to find a way to connect with millennials while you are on-site at a college campus. It could be your boss asking for a more efficient way to connect with your very own employees. All you need to know is..."Do it in DocuMatix!" You already have the tool, and Shelby can share with you a variety of ways in which her institution has taken the question, "How can we...?" and discovered that the best answer continues to be, "Do it in DocuMatix!"

1:45pm - 2:30pm

Open Discussion

2:30pm - 2:45pm

Break / Networking

2:45pm - 3:45pm

Paul Jaramillo, President/CEO, DocuMatix



Paul will introduce new and upcoming features to the DocuMatix Product Suite, and go over the product road map for 2017.

3:45pm - 4:30pm

Audra Wilder, Vice President Marketing, GE Credit Union



This discussion will focus around the year of targeted marketing for GE – both automated and trigger based – the reasons, the goals, some trials and tribulations of the process (and how to avoid them)! Audra will also share some specific successes that have truly impacted the bottom line as well as the Strategic Scorecard – and a glimpse of her goals for the year ahead.

## Friday, January 20, 2017

7:30am - 8:30am Breakfast, Bristlecone Ballroom 1&2

Meeting Room: Bristlecone Ballroom 6

8:30am - 9:15am

Sarah Cecchin, Sr. VP, Marketing & Communications, 1st United Credit Union



Meet “me-mail” – a targeted, highly relevant, set-it and forget-it approach to email marketing. Using real-time core integration, Sarah will take us through her intuitive, highly relevant, transactionally-triggered email paths. She’ll demo her multi-channel survey implementation to see a true picture of company-wide net promoter score displayed instantly on her intranet. Plus, see how she’s fully integrated DocuMatix into their CRM to give front-line employees an up-to-the-minute picture of member communication.

9:15am - 10:15am

Trent Hawes, CTO, DocuMatix



Trent will introduce and discuss the 2016 Credit Union Email Metric Study. This will include detailed discussion of current trends in mobile vs desktop, email client usage, open rates and click-through rates by communication type and asset size.

10:15am - 10:30am

Break

10:30am - 11:15am

Julie Goe, Marketing Coordinator, Clark County Credit Union



See how CCCU has saved time and money while modernizing communications and increasing efficiency. Events are now easier to plan and manage; Monthly newsletters have higher readership and increased member engagement by incorporating videos, surveys and hyperlinks.

11:15am - 11:45am

Jessica Stetson, Business Intelligence Analyst, Space Coast Credit Union



Research shows that new members represent your best opportunity for cross-selling additional products and services. The first 90 days are the most crucial for building your relationship with a member, but how can you keep up with scheduled communications when new members are joining every day? The Onboarding Module offered by DocuMatix makes it not only possible, but very low maintenance. Jessica will walk you through step-by-step how to implement a new member onboarding program and she will share the success she has experienced with the DocuMatix solution, including email open rates of twice the industry average.

11:45am - 12:00pm

DocuMatix Recap and Closing Remarks

12:00pm

Lunch Box Grab & Go