UNITI • EAST

PEAK CONSULTING

2-Day Pre-Conference Training May 5-6th, 2025

Monday 5/05/25	Loans *Revolution A*	Deposits *Revolution B*	Business Analytics/ Automation *Revolution D*
12:00-1:00	**Lunch -*Patriot 1 & 2***		
1:00-1:15	**Introduction - Patriot 1** In this session we will introduce the Peak team and review the session topics that will be covered over the next 2 days. This will allow members of your team to set themselves up for success, getting the most value from the conference.		
1:15-2:30	**Ancillary Collateral Functions Workshop** Go beyond the basics of collateral management. This session explores often-overlooked yet critical functions within your collateral system, including UCC tracking, appraisals and valuations, asset-based lending (ABL) integration, and automated deposit holds. Learn how to leverage these tools for greater efficiency and risk mitigation.	**Deposit Analysis Workshop** In this interactive, hands-on workshop we'll equip you with the practical skills to effectively set up and utilize Deposit Analysis. We'll walk through each step, from initial setup to identifying when it's the right tool for your commercial clients, minimizing the effort required. Plus, we'll share best practices for handling special pricing, ensuring you maximize value while keeping things simple. Leave ready to leverage Deposit Analysis for strategic growth without the administrative burden.	**Starting an Automation Journey with Excel: Macro Writing 101 Workshop** Learn to automate repetitive Excel tasks with macros! This beginner-friendly session covers macro recording, basic VBA, and customizing your automations. No coding experience needed. Free up your time and boost your spreadsheet skills!
2:30-2:40	**Break**		
2:40-3:20	**Optimize Director and Increase Productivity - Patriot 1** Are you leveraging Director functionality to improve your experience? Come learn how a Director Optimization could benefit your institution whether you are in-house or outsourced. This session will also review out of the box features and functionality that exists with every Director deployment. We'll review how you can customize Director to give you the best experience for importing and retrieving documents as well as how to link records together to give you a wholistic view at the customer or transaction level.		
3:20-4:20	**General Roundtable - *Patriot 1*** In this Q & A session we will take topics from all areas with everyone together as a group. We often benefit from hearing about pain points and feedback from other areas of the bank, in addition to our own. Bring your roundtable topics to this session that may not have been previously addressed or if you desire to address a larger audience.		
4:20-4:30	**Break**		
4:30-5:30		**Stop Pay Processing: Unlock Efficiency and Minimize Risk** Are stop payments a source of stress for your team? This detailed session will transform you into a stop payment pro! We'll dissect everything from specification setup (bring your DDA, SAV, and IES specs for personalized insights!) to best practices and streamlined review processes. Walk away with the knowledge and tools to boost efficiency, minimize risk, and handle stop payments with confidence. Don't miss this opportunity to level up your skills!	**Business Analytics: Query Calculations: What, Why, and How?** This session dives into practical applications of BA functions, showing you how to streamline your data for deeper insights. **Financial Analysis:** Breaking down loan payments for detailed reporting. **Vendor Management:** Mapping Tran Codes for proper vendor file processing. **Performance Analysis:** Filtering reports to focus on the top 10 accounts. **Data Standardization:** Padding values with leading zeros and proper casing names.
Tuesday 5/6/25	**Loans** *Revolution A*	**Deposits** *Revolution B*	**Business Analytics/ Automation** *Revolution D*
8:30-9:40	**Streamline Your File Maintenance Review** Tired of sifting through File Maintenance Reports? This session explores three powerful solutions to simplify file maintenance review. Discover how Director Workflow, Business Analytics, and Automation can help you quickly identify critical changes and reduce review time. Learn which tool best fits your institution's needs and reclaim your valuable time.		
9:40 - 10:40	**Loan Roundtable**	**Deposit Roundtable**	**Business Analytics/Automation Roundtable**
10:40-10:50	**Break**		
10:50-12:00	**Data Integrity: Name, Address and Collateral** Tired of wrestling with messy customer and collateral data? This session will reveal the secrets to transforming your data from a source of frustration to a driver of success. Learn proven techniques to clean up duplicate and inaccurate information, establish effective data standards, and utilize automation and business analytics to ensure ongoing data accuracy. Unlock the power of clean, reliable data and make better decisions for your business.		
12:00-1:00	**Lunch - *Patriot 1 & 2***		
1:00-2:00	**Past Due Loans, Shadow Loan Accounting and Managing OREO Assets** Strengthen your loan management skills and minimize risk. This session will equip you with the knowledge and best practices to effectively handle past due loans. Learn optimal timing for past due loan review and past due notices, understand Shadow Loan Accounting, and discover how to manage OREO (Other Real Estate Owned) assets seamlessly within the Premier core.	**Business Analytics Workshop: Tax Reporting Customer Data** This session focuses on ensuring your customer data is ready for tax reporting. We'll demonstrate how to identify potential exceptions and gaps in your customer name and address data, using reports designed to highlight common issues that could impact tax form generation. Learn how these reports can help you proactively address data quality concerns and ensure accurate, compliant tax reporting.	