Risk Management Series:
Mobile Device Risks & Compliance Rules: Managing Your Bank's BYOD & COPE Policies

Community Bankers of Wisconsin

Thursday, APRIL 17, 2014
2:00 pm – 3:30 pm Central

Employees increasingly are using smartphones, tablets, and other mobile devices to conduct bank and personal business. Some use personal, unsecured smartphones to conduct bank business. Others use bank-owned phones to hold private, nonbusiness-related conversations. Either way, mobile device use increases your bank's legal, security, regulatory, and productivity risks. To help manage potentially costly risks, best practices call for the adoption of Bring Your Own Device (BYOD) and Company-Owned Personally Engaged (COPE) policies, supported by employee education and technology tools.

This webinar will review the mobile/electronic risks facing financial institutions and will provide best-practices-based rules, policies, and procedures to help reduce the likelihood of online disasters, while increasing compliance and enhancing communication. Learn why and how to develop and implement a strategic mobile device policy program, combining written rules, employee training, and technology tools. Don't let smartphone slip-ups and mobile missteps blemish your bank's reputation, damage business relationships, or sink your career.

HIGHLIGHTS

- Managing mobile device risks and compliance with best-practices-based policy
- Writing and implementing effective BYOD and COPE policies
- Safeguarding customer financials and bank data on personal and bank-owned mobile devices
- Communicating clearly, compliantly, and effectively with internal and external audiences via smartphones
- Choosing the "right" communications channel and tone to communicate bank business
- Preserving, protecting, and producing electronic business records created by mobile devices
- Anticipating and preventing costly legal liabilities, regulatory disasters, security breaches, PR nightmares, and other mobile risks
- Applying best practices to help ensure legal, regulatory, and organizational compliance
- Instituting content rules to enhance mobile communication and compliance
- Enforcing personal-use rules to minimize risks and maximize productivity
- Applying the "3-Es" of mobile compliance management
- Monitoring: reconciling privacy expectations with legal realities
- Real-life mobile disaster stories

- **TAKE-AWAY TOOLKIT**
    - Sample smartphone and mobile device policy
    - Content and netiquette rules fact sheet
    - Whitepaper on how to write effective electronic policies
    - Employee training log
    - Quiz you can administer to measure staff learning and a separate answer key

WHO SHOULD ATTEND?
This informative session will benefit HR managers, compliance officers, lawyers, records managers, IT professionals, risk managers, operations managers, and others responsible for protecting the bank's assets, reputation, and future.

ABOUT THE PRESENTER – Nancy Flynn, The ePolicy Institute™ & Business Writing Institute™
A recognized expert on workplace policy, communication, and compliance, Nancy Flynn is the founder and executive director of The ePolicy Institute and Business Writing Institute. She provides training, coaching, and consulting services to clients seeking to minimize compliance risks and maximize communication skills. Nancy is the author of 12 books including *The Social Media Handbook* and *Writing Effective E-Mail*. An in-demand trainer, she conducts seminars, webinars, and one-on-one coaching for financial institutions, financial services firms, and other clients worldwide. She also serves as an expert witness in litigation related to workplace email and web use.

THREE REGISTRATION OPTIONS

1. LIVE WEBINAR

Member Price **$230**
NonMember Price **$275**

The **live webinar** option allows you to have **one telephone connection for the audio portion and one Internet connection (from a single computer terminal)** to view online visuals as the presentation is delivered. You may have as many people as you like listen from your office speaker phone. Registrants receive a toll-free number and pass code that will allow entrance to the seminar. The session will be approximately 90 minutes, including question and answer sessions. Seminar materials, including instructions, PIN number, and handouts will be emailed to you prior to the broadcast. You will need the most-current version of Adobe Reader available free at www.adobe.com.

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2. ON-DEMAND WEB LINK & FREE CD ROM*

Member Price **$230**
NonMember Price **$275**

Can't attend the live webinar? The archived webinar is a recording of the live event, including audio, visuals, and handouts. We even provide the presenter's email address so you may ask follow-up questions. Approximately one week prior to the webinar, you will receive an email with the archived webinar link. This webinar link can be viewed anytime 24/7, beginning 6 business days **after** the webinar and will expire 6 months after the live program date.

As an added bonus, you will also receive a FREE audio/visual CD ROM.* The CD ROM includes the original audio/visual presentation, the question and answer sessions, and the handouts. Use the archived webinar or this "off-the-shelf" training program for those that could not attend the live seminar and for future training.

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3. BOTH LIVE WEBINAR & ON-DEMAND WEB LINK (INCLUDES FREE CD-ROM*)

Member Price **$300**
NonMember Price **$350**

Options 1 and 2

The archived webinar (including the free CD ROM) may ONLY be ordered for 6 months following the webinar. Neither the link nor CD will be available after this time.

***CD ROM for Mac and PC use only**

Convenient! Listen on your iPad, iPhone, Android - Instructions will be emailed to you with the on-demand link .

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TO REGISTER

- ***By Mail: Community Bankers Financial Education, 455 S. Junction Road, Suite 101, Madison, WI 53719***
- By Fax: 608 / 833-8114 QUESTIONS - call 608/ 833-2384
- **On Line: Click Here Your Log-In ID Number is the same as your bank's FDIC Cert. Number.**

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