



## **PensionGold® Teaming Conference 2023**

### **DRAFT AGENDA as of 7-25-2023**

#### **Sessions**

##### **PensionGold Version 3 / Version 4**

- ❑ **Product Update (Version 3 and Version 4)**  
Join the Product Development team for an update on recent and planned development activities affecting both Version 3 and Version 4.
- ❑ **PensionGold Does That? (Version 3)**  
Have you ever wondered if you're getting all the value out of your PensionGold software? Often, we find there are features and functionality that are available in our products, but some of our customers don't realize they exist. This session will provide an overview of some of the most commonly unknown features and functionality available in the products. Come find out what you didn't know so you couldn't ask, tips for using the product, or even ways to be more efficient in your daily activities.
- ❑ **Customizations and Enhancements**  
Many different customizations have been implemented for Version 3 customers. These customizations can improve productivity, aid in financial balancing, increase security, and increase the amount of useful information available to the user. This session provides an overview of the customizations that are relevant to all Version 3 users as well as an explanation of the value each one provides.

##### **PensionGold Version 2**

- ❑ **Product Update (Version 2)**  
In this session, our Product Support team will review the recent development activities with PensionGold Version 2 and the status of where customers are at in taking the latest release. This session will include an overview of where we will be focusing our attention for future improvements and enhancements to the Version 2 product and Web Member Services. The session will also provide a forum for customers to present ideas, suggestions, or requests for product features and enhancements.

□ **PensionGold Does That? (Version 2)**

Have you ever wondered if you are getting all the value out of your PensionGold software? Often, we find there are features and functionality that are available in our products, but some of our customers don't realize they exist. This session will provide an overview of some of the most commonly unknown features and functionality available in the products. Come to this session to find out what you didn't know so you couldn't ask, tips for using the product, or even ways to be more efficient in your daily activities.

## **General Sessions**

□ **Welcome and Introductions**

Welcome to the Annual PensionGold Teaming Conference! We will include a roll-call introduction of customers this year and introduce some key members of the LRS Retirement Solutions group. Other topics to be covered include some of the latest happenings in the LRS Retirement Solutions group, along with future plans and direction. There will also be a brief overview of the conference agenda, an overview of this year's conference theme, and details of this year's Team Challenge. Towards the end of the Welcome Session, attendees will get the chance to "put a name with a face" for the many Retirement Solutions Product Support team members as well as providing an opportunity to get acquainted with their fellow conference participants.

□ **1-on-1 Meetings**

A great option for Day 3 of the conference, though also available at select times on Days 1 and 2.... Attend pre-scheduled meetings with Management, your Product Support team, your Implementations team, the Product Development team, and/or our Infrastructure team. Many attendees find these individual meetings beneficial as they get to know the Retirement Solutions Team, plan for future projects, troubleshoot existing issues, or get hands-on with new product features and releases.

□ **Customer Led Session**

This session has been reserved for our attendees to use for open general discussion. Topics can range from industry information and legal trends to general technology items, etc. Generally, one or two customer attendees are selected prior to the conference to host and lead this popular session.

□ **Product Suggestions Roundtable (all versions)**

This session has been reserved to give conference attendees an opportunity to provide feedback regarding PensionGold products and services. It's a forum for customers to present ideas and suggestions for product features and enhancements that may not already be planned for in a future release. Customers are encouraged to create their list of ideas and suggestions in advance and bring it with them to the session for discussion. This session is open to customers running any version of PensionGold.

□ **Retirement Solutions 101**

Are you a first-time attendee? Are you a new user of PensionGold software or maybe in the

middle of an implementation project? If you answered yes to any of these questions or would like to explore the Who, What, Why, and How of the Retirement Solutions Product Support team, plan to attend this informative session.

❑ **Microsoft Excel Tips and Tricks**

Increasingly, large amounts of data from PensionGold are being imported into Excel on a regular basis. In this session, an instructor from LRS Education Services will demonstrate several powerful time-saving shortcuts to work with this data efficiently and accurately.

❑ **The New Google Analytics (GA4)**

Google Analytics is the enterprise-class web analytics solution that gives you rich insights into your website traffic and marketing effectiveness. Powerful, flexible, and easy-to-use features let you see and analyze your traffic data in an entirely new way. This session will give an overview of what GA4 provides, what value it can provide, and what it takes to get it included in your website (WMS or MemberDirect).

❑ **Product Lab** *[to be held on the optional 3<sup>rd</sup> day of the conference]*

Are you curious about enhancements to the PensionGold products? Are you wanting to become more familiar with Template Editor or Ad Hoc Reporting tools? Do you have questions about Outlook Connector or Message Center? Are there other features within the PensionGold suite of products you would like to work with? This is your chance to get hands-on experience. We will have members of our Retirement Solutions team on hand and available to assist you and answer your questions. If there are specific scenarios you would like to observe, chat with your favorite Retirement Solutions staff member prior to the Product Lab so they will be able to tailor the session to your needs.

❑ **Engage Your Membership (Panel Discussion)**

More and more effort is being made to engage membership participation, whether it is through electronic means or seminars. What are some the new ideas being used to continually encourage membership participation? Three customer panelists will share information from their organizations, and the moderator, John Katalinich, will be encouraging input and discussion from the audience.

❑ **Campus Tours**

Take a 20-minute walking tour of the LRS campus. This guided tour will allow attendees to see our latest building additions and will provide a brief overview of the other divisions within the company.

❑ **Roundtable Discussions**

Attendees will have an opportunity to join several tables during this two-hour session. At each table, they will have the opportunity to participate in interactive discussions on a variety of topics with their peers and members of the Retirement Solutions team. A [sample](#) list of topics includes: Member Identification other than SSN, Electronic Signatures, Kat Chat, DBA Checkup, Tom's Table, Death Audit Processing, V4 Tech Talk, and Training New Staff.

- ❑ **Correspondence and Electronic Document Management (Imaging)**  
Customers continue to look for ways to increase their use of the electronic document imaging system and correspondence features within PensionGold. Share, listen, and interact with other funds to learn about best practices LRS has implemented in recent years.
- ❑ **Workflow and Workload Management**  
Join Retirement Solutions team members as they facilitate this roundtable session which provides an opportunity for customers to share how they have managed work with various PensionGold functionality. Topics will include Workflows, Message Center, Contact Logs, Correspondences, and Milestones.
- ❑ **Ad Hoc Reporting Roundtable** *[to be held on the optional 3<sup>rd</sup> day of the conference]*  
Join our DBA and Product Support team members for a roundtable discussion about all things ad hoc reporting within PensionGold Version 3 and Version 4. Curious about best practices? Not sure where to begin? Have technical questions about the solutions? This is the session for you. We will present a brief overview and demo of our ad hoc solutions, but most of the time will be spent in open discussion.
- ❑ **PensionGold Version 4 Demo** *[to be held on first day and the optional 3<sup>rd</sup> day of the conference]*  
Join the Product Development team for a demonstration of PensionGold Version 4.
- ❑ **PensionGold Security Panel Discussion**  
This highly interactive session will provide a forum for LRS Retirement Solutions to share security best practice solutions for the PensionGold suite of products. Customers are encouraged to join the conversation and seek advice from others in attendance.
- ❑ **Teaming Conference Reception – at the Inn at 835 Conservatory, Springfield**  
(Tuesday evening) Join your fellow attendees and the LRS Retirement Solutions team for a fun and relaxing time as you build relationships with your industry peers and Retirement Solutions team members at the Teaming Conference Reception. You're invited to test your "poker face" at our **casino-themed reception** taking place on Tuesday night at the Inn at 835 Conservatory in Springfield. Join us for food, drinks, and fun!
- ❑ **Closing Session**  
We will wrap up the formal portion of our PensionGold Teaming Conference with a final session, late on Wednesday afternoon. During this session, we will summarize our thoughts and views on this year's conference and collect feedback from the attendees on how to improve the PensionGold Teaming Conference in future years. In addition, we will collect the overall conference evaluation surveys. We will also announce the winners of the Team Challenge and award prizes to those in attendance.

