

# *Building* A Better *Conference*

*BY JERI YOSIDA*

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**I** know that this is going to sound very “California.” We set an intention when we created NEXT. That was ultimately what has differentiated NEXT from any other mortgage conference. NEXT is the mortgage industry’s only tech-centric conference designed specifically for women executives. Our intention was an event that provided intel that would benefit drivers of business outcomes, while accounting for the comfort that accomplished women executives have come to expect. A place where women’s sensibilities weren’t just considered, but were focused on; a place where attendees would receive information appropriate for the decision makers and executives that they were — the tech-loving executives they were, to be exact.



Our first event, held in January in Dallas, attracted nearly 200 women from leading mortgage lenders, the GSEs, technology providers and service providers. More than 30 of the nation's largest mortgage lenders were represented, 89% of attendees held a title of VP or higher, and the total attendance was comprised of 84% women. True to our intention of attracting tech-loving



executives, attendee titles included the likes of COO, CTO, Technology SVPs — the roster was heavy with decision makers whose titles clearly indicated that they vet technology for use in mortgage lending operations. NEXT is open to any woman executive in mortgage lending. You don't have to be a member of a certain association or user of a certain technology.

We received an unexpectedly large amount of positive feedback from attendees, exhibitors, sponsors — even our college intern. One of our attendees literally got teary-eyed when thanking us for putting on the event. A sponsor said her company received “more love” from NEXT than it has at conferences where they've spent literally 10 times the

amount they spent at our event. During the week that followed the event, we received messages from attendees who were practically pleading with us to continue hosting events.

The question is, *why*? Both my co-founder and I have attended dozens of mortgage conferences, and we've spoken with dozens of people about dozens of mortgage conferences. In comparison,

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we received an inordinate amount of positive feedback. Quite frankly, the amount of positive feedback we received eclipsed anything we've ever encountered. The reason is intention.

Let's go back to our original intention: providing intel that would benefit drivers of business outcomes, while accounting for the comfort that accomplished women executives have come to expect. That meant we'd need to not only provide quality content, but also create an environment that promoted networking and the exchange of information among attendees. As most of us know and as many studies have indicated, the quality of an executive's network is crucial to success. A lot of intel comes from peers, whether through

brainstorming and direct questions and answers, or through the grapevine — discussions on who's doing what.

Fulfilling the first part of our intention was pretty straightforward. We searched — and sourced — content that provided the latest tech intel, and put together hard-hitting panels on how successful lenders are deploying technology to

compete in today's market. One of our most popular panels was *Technology and the Borrower Experience*, which was moderated by Crystal Sumner, Head of Legal at Blend. Joining Crystal were panelists Cerita Battles, SVP & Head of Retail Diverse Segments at Wells Fargo Home Mortgage, Julie Lane, SVP Digital Strategy & Marketing at Freedom Mortgage and Charity Moreland, National Builder Sales Manager at Homeowners Financial Group.

Another hugely popular panel was the highly anticipated *Inside Quicken Loans: Secrets to Driving IT Innovation*. This panel included executives Jennifer Sun, VP, Data Operations, Stacey Caster, VP, Technology

Communications, Maggie Hubble, Director, Data Governance, and Jolie Behrns-Vitale, Business Intelligence at Quicken Loans. Sarah Wheeler, magazine editor at HousingWire, moderated.

We got a lot of compliments on many sessions, but these two were clear frontrunners.



NEXT's technology showcase demonstrations were another great source of intel. Attendees got to learn about new mortgage technology that included eClosing solutions, borrower mobile applications, client relationship technologies, construction loan management and more. We limited the number of tech demos to just 15. Prior to hosting NEXT, we'd spoken with lenders who found it difficult to remember or pay attention to a barrage of tech demos.

As for an environment that fostered effective, connected networking, that wasn't quite so straightforward. As it turns out, our content played a big role in creating that environment. Here's how. At conferences, attendees often discuss content. It's a great way to break the ice with a stranger. NEXT focuses on

technology and as it turns out, tech is a great equalizer.

One of the media representatives who attended the conference said he was at a dinner where, out of the eight people at the table, no one knew any of the others prior to the conference. He made a point of saying how unique it is to have strangers feel comfortable enough to

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go to dinner together. Being connected through the conference was enough to bring them all together.

It turns out that even on day one, women were making authentic connections. One of our tech demo moderators told us that during breakfast, prior to the first day's sessions, she and another lending executive had a meaningful discussion about a business challenge. Our moderator walked away with a lot of insight into an approach and solution — not to mention the fact that she got the relief that comes from relating with a peer over a common challenge. We wanted to do something special for our main cocktail party, so we partnered with Girls Inc. of Metropolitan Dallas and turned the cocktail party into an interactive charity activity we called "Prepping our NEXT

Leaders," where attendees built gift bags of school supplies for Girls Incorporated of Metropolitan Dallas. Again, we got amazing feedback about the event, which makes sense. Over 65% of our attendees, both lenders and non-lenders, were director level or higher, who had just spent the day investing in themselves.

Giving back was a natural way to round out their experience. Both lenders and non-lenders participated. Some of our sponsors, namely Pavaso, Loan Scorecard, SimpleNexus, WeGoLook, Docutech and BombBomb, got involved by making donations to offset the costs of the supplies. All proceeds were donated to Girls Inc. of Metropolitan Dallas on their behalf.

Attendees also came together virtually. Most attendees installed our conference mobile app, and started using it to set up meetings, trade contact information and share photos. There were 446 messages exchanged in the app and more than 1,500 views on attendee profiles — not bad for just under 200 attendees.

One of NEXT's goals was to provide deserving executives with greater

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visibility and recognition. We hosted media outlets that included Progress in Lending, HousingWire, Lykken on Lending and Mortgage Cadence's LendTech video series, all of whom reported live from the event.

We also hosted two conference contests, and more than 70% of attendees participated by voting. They chose Notarize as NEXT's Best in Show Tech Demo, and also selected the NEXT Who's Who, which recognizes NEXT conference attendees who are demonstrating leadership in the mortgage industry.

The NEXT Who's Who is a bit different from other industry awards. First, winners are selected by peers, rather than a panel of judges, based on factors like their knowledge, insight, presence, communication, experience and commitment to the industry. Second, The NEXT Who's Who does not call for official nominations, so there is no marketing or PR to sway voters. And finally, any

NEXT attendee is eligible, regardless of age, time in industry, position or other factors.

Our first place winner was Cerita Battles, senior vice president and head of retail diverse segments at Wells Fargo Home Mortgage. Cerita was a featured speaker on "Technology and the Borrower Experience," a session that was presented on Thursday, January 18, 2018, the first day of the conference.

While the list was created to name three professionals, second place involved a three-way tie between Julie Lane, SVP Digital Strategy and Marketing at Freedom Mortgage; Crystal Sumner, Head of Legal at Blend; and Jennifer Parker, General Manager of Digital Mortgage Solutions at Notarize. Lane and Sumner participated on the "Technology and the Borrower Experience" session. Parker presented for Best in Show demo winner, Notarize.

The next NEXT is set

for June 21st and 22nd in Dallas at Hotel ZaZa, which is nestled in the city's fashionable Uptown neighborhood. We selected ZaZa because we feel it provides the boutique hotel experience and perks our attendees appreciate — at least, that's what their feedback indicates.

We intend to keep NEXT small because we want to maintain that personal, friendly and open vibe that our attendees haven't been able to find anywhere else. Based on what we're hearing, we think the days of mortgage conferences that provide quantity over quality are going to diminish over the coming years. Just about all of the feedback we received — from lenders, GSEs, and tech and service providers — indicated that fewer attendees allowed for better connections and higher quality networking.

In fact, one of our sponsors said that "NEXT's small and intimate size allowed us to speak to just about every attendee," and that they'd gotten "just as many leads — if not more" as they'd gotten from bigger shows.

We're really proud that we've been able to provide women executives with an event that provides quality intel and networking opportunities. It's exactly what we intended. To register for the next NEXT, simply go [www.nextmortgageconference.com](http://www.nextmortgageconference.com). ❖

#### ABOUT THE AUTHOR

**Jeri Yoshida is co-founder of NEXT and a 20 year mortgage industry veteran with over 15 years of experience in mortgage public relations and communications. She has created visibility programs for dozens of companies and has crafted strategies for maximizing ROI.**

