



The View 2011

— 360 VIEW USERS CONFERENCE —

Nashville, TN • October 2-5
Gaylord Opryland Resort

360 View™
turns 10!



The View 2011

360 VIEW USERS CONFERENCE

Conference Agenda

Sunday, October 2, 2011

1:30 - 5:30 PM	Pre-Conference Golf Tournament at Gaylord Springs Golf Links
6:30 - 9:30 PM	Sunday Night Mixer at Gaylord Opryland, Delta Atrium at Water's Edge Come by and meet your fellow attendees and your 360 Team for drinks and appetizers in the Delta Atrium.

Monday, October 3, 2011

8:30 - 9:00 AM	Registration
9:00 - 9:30 AM	Welcome
9:30 - 10:30 AM	Snap, Crackle, and POP!: How SmartPops Is Working for Institutions Like Yours Do you lay awake at night wondering how other 360 View clients are using SmartPops? Well, you're not alone... or maybe you are. Regardless, this session is for you. SmartPops is more than just a smiling face on your desktop. Hear how clients are putting that happy face to work.
10:30 - 10:45 AM	Break
10:45 AM - 12:00 PM	<i>Concurrent Breakouts</i> <i>Breakout A:</i> To Cross-sell or Not To Cross-sell: Marketing Offers That Work Ever wonder about that sure fire cross-sell opportunity that is destined for success? Maybe you would like to know how your peers structure and utilize marketing offers. Get ready for a session geared toward helping you succeed with strategizing, setting up, and executing marketing offers within 360 View. <i>Breakout B:</i> From Changing Light Bulbs To Hot Carding: The Many Faces of Incidents Think of Incidents as the Elvis of 360, they take care of business in a flash. Not sure how to harness their total power? We've got some users that would love to tell you everything they're tracking, how they structured their roll out, and how they are making incidents work for them.
12:00 - 1:30 PM	Lunch (Provided)
1:30 - 2:45 PM	State of the Union: Whiteboard Revealed and New Development Sneak Peak Sure, you have a CRM loaded with functionality from module to module, but even you have to admit that you're one of those people who always want more. See a few of the new features that we will soon be making available— or may be already available. We will also expand upon the evolution of Whiteboard and the current state of all your suggestions. Join in on the excitement!
2:45 - 3:00 PM	Break

3:00 - 4:30 PM	<p>“Here’s a topic, the <i>Prince of Tides</i> is neither about a Prince or Tides...discuss.” - Group Networking Session</p> <p>Sharing is caring, and we care, a lot. In the past, this has been one of our most popular sessions, and we want to give you more time to network and connect with groups of other users. Discuss topics we provide or ones that you bring to the table. This will be an organized chance to pick some brains.</p>
Monday Evening Time TBD	<p>Monday Night Event at the Fontanel Mansion and Farm</p> <p>You won’t want to miss an evening at The Fontanel Mansion, the 27,000 square foot log home on 136 acres formerly owned by Barbara Mandrell. We have the run of the mansion where we will enjoy dinner, drinks and live entertainment provided by Nashville hit songwriters, David Lee and Brandon Kinney. Shoot pool in the Soda Shoppe Room, kick-up your heels on the glass-covered indoor pool, or just hang out on one of the many porches and patios.</p>

Tuesday, October 4, 2011

9:00 - 9:45 AM	<p>“Where’s My Jetpack?”: Discussions of Your Use of Emerging Technologies</p> <p>This general session will explore how emerging technology (e.g. SmartPhones, Tablets, Internet, Twitter, Facebook, LinkedIn, Cloud Computing, etc.) is being used at your institution and how you see it being used in the future. How accessible is mobile technology to your employees? How are you handling security? How are you using mobile technology to create new conversations with your customers? Are you investing in tablets for use in your customer presentations? What is your current use of SmartPhones in support of your current strategy? How do you see the impact of mobile technology on your future use of 360 View? This session will be led by members of the 360 View team and will leverage the results of pre-conference surveys, industry research data, and encourage open discussion from all in attendance.</p>
9:45 - 10:00 AM	Break
10:00 AM - 12:00 PM	<p>Keynote Speaker: Brett King—The Big Shift</p> <p>Brett will discuss how customer behavior and technology will change the future of financial institutions as we know it. He will share current examples from around the world as he builds a case for Banking 2.0. This session will truly affect how you plan your future strategy. You won’t look at banking the same.</p>
12:00 -1:30 PM	Lunch (Provided)
1:30 - 2:45 PM	<p><i>Concurrent Breakouts</i></p> <p><i>Breakout A:</i></p> <p>Show Me the Money: Incentive Plans in 360 View</p> <p>“Money, Money, Money – It’s only Money...” Is it only money, or is it the key to motivating the right behaviors of your employee’s and bringing bottom line results to your institution? Attend this session and hear actual examples of incentive plans that are working and learn how you can avoid the pitfalls of implementing the wrong plan for your institution. These incentive plan leaders are driving employee performance and keeping management happy signing incentive checks. Cha-Ching!</p> <p><i>Breakout B:</i></p> <p>I Heart Release Patches: The Best of 2010SR1 ... So Far</p> <p>2010SR1 was loaded with all new functionality and goodies but let’s not forget about all the Release Patches since then. We want to make sure you’re not missing out, so we are going to highlight some of the features and functionality we’ve added since the last release.</p>
2:45 -3:00 PM	Break
3:00 - 3:30 PM	Company Overview

3:30 - 4:00 PM	Intellectual Recreation: Fun Stuff That Might Make You Smarter
4:00 - 4:30 PM	Open Forum Got a question? Ask it. Wanna say something? Say it. This Open Forum is your time! All attendees, as well as your 360 View family, will be able to ask questions and weigh in. Warning- we cannot be held responsible if knowledge starts to ooze out of your ears.

Wednesday, October 5, 2011

9:00 - 10:15 AM	A Rolling Stone Gathers No Moss: Continued Use of 360 View We know that rolling out and using 360 View doesn't happen overnight, and many of our customers have pieces of the system they haven't started using yet. Rolling out 360 View is a process that may happen in a period of months or years, and it is something every client will encounter. Listen to other users discuss their rollout game plan and share their experiences.
10:15 - 10:30 AM	Break
10:30 - 11:30 AM	<i>Concurrent Breakouts</i> <i>Breakout A:</i> Pipelines That Won't Leak: How To Roll Out and Get Buy-in Can't get buy-in for Pipeline? We want you to know this is a common problem, and there's a cure. Other clients, just like you, are seeing results, and you can too. We recommend a good dose of listening to how others have overcome their roll out obstacles, who or what caused any "roadblocks," and how they are using pipelines to their fullest. Side effects may include a renewed sense of direction and encouragement. <i>Breakout B:</i> Show You the Money: 360 View Profitability Sometimes less is more...sometimes more is less...sometimes more is more and sometimes less is less. Are you confused yet? Well, don't be! The fact is you want more from your CRM system and not less. Join us for an interactive session to learn how your peers have taken their CRM strategy to the next level by implementing 360 View Premier Profitability. Learn about their implementation and roll-out, reporting and integration into their institution's culture to add greater value to their customer's relationship and overall profit to the institution.
11:30 AM - 12:00 PM	Closing

Note: Conference schedule and speakers are subject to change.

More Opportunities:

Demo Café- Available throughout the conference, The Sales Team will be standing by to answer questions and show you anything you'd like to see in 360 View.

Town Hall Development Sessions- We are looking for a few good participants that can bring their thinking caps to the table. These small intimate sessions will require you to participate in the planning process, assisting the 360 View Development Team with feedback regarding design, feature sets, business logic, and more. These sessions will not be an easy task and will require you to do due diligence before arriving in Nashville so that you may come prepared to contribute. Seats are limited, so there will be an application process to assist in determining who will be able to participate in these sessions. Look for more information regarding these session in the coming weeks.