

SCHEDULE

MON. AUG. 9

8:00 8:45	CHECK-IN AND BREAKFAST
8:45 9:30	GENERAL SESSION: Conference Welcome
9:30 10:30	1ST SESSION: Exploring the Western Expansion of 360 View Activities and Contacts Don't Be Delinquent for Delinquency Management A Grab-Bag of All Things 360
10:30 10:45	BREAK
10:45 12:00	2ND SESSION: Customer Letters On the Fly: No Way, Yes Way! Profitability for Joe Six-Pack: The Non-CFO Version Under the Hood: Maintaining the 360 View Engine
12:00 1:00	LUNCH (PROVIDED)
1:00 2:00	GENERAL SESSION: Marketing Overview
2:00 3:00	3RD SESSION: Marketing: It's All New Folks! (this class continues thru 4th session) Exploring the Western Expansion of 360 View Activities and Contacts We All Need a Little Help From Our Friends: Top 360 View Support Questions
3:00 3:15	BREAK
3:15 4:30	4TH SESSION: Marketing: It's All New Folks! (continued from 3rd session) Pipeline, Incidents, & Referrals, Oh My! You Have the Tools: Do You Have the Right Sales Strategy?

TUE. AUG. 10

8:00 8:30	BREAKFAST
8:30 9:30	GENERAL SESSION: The Power of Social Media
9:30 10:30	1ST SESSION: Dr. Way's Marketing Lab A Grab-Bag of All Things 360 SmartPops, SmartyPants: It's All Grown Up!
10:30 10:45	BREAK
10:45 12:00	GENERAL SESSION: 360 View User Roundtables: A Networking Event
12:00 1:00	LUNCH (PROVIDED)
1:00 2:00	2ND SESSION: Cross-selling: Real Strategies to Take Home to Mom Widgets: Why Aren't You Using 'em? Analytics: How 360 View Uses Them and How You Can Too
2:00 3:15	3RD SESSION: Dr. Way's Marketing Lab Pipeline, Incidents, & Referrals, Oh My! SmartPops, SmartyPants: It's All Grown Up! We All Need a Little Help From Our Friends: Top 360 View Support Questions
3:00 3:15	BREAK
3:30 4:30	4TH SESSION: Profitability for Joe CFO: The CFO Version Making Incentives Work for You: A Little Shop of Motivation Under the Hood: Maintaining the 360 View Engine

WED. AUG. 11

8:00 8:30	BREAKFAST
8:30 9:30	GENERAL SESSION: They Are Your Best Customer, Reward Them For Dear Sake!
9:30 10:30	1ST SESSION: Mini-Whiteboard for Incentives Customer Letters On the Fly: No Way, Yes Way! No More Snail-Mail, Email!
10:30 10:45	BREAK
10:45 12:00	GENERAL SESSION: The Future Is So Bright They Have to Wear Shades
CONFERENCE ENDS AT 12:00PM	

Name: _____ Email: _____

Phone #: _____ Institution: _____

SUN. AUG. 8

SUNDAY NIGHT MIXER (stop by for appetizers/drinks at the Hilton Downtown, 6-9:00ish)

Yes, I'll be there. No, I will not be attending. Maybe

MON. AUG. 9

8:00 Check-in and Breakfast

8:30 General Session: Conference Welcome

9:30 **1ST SESSION:** _____

10:45 **2ND SESSION:** _____

12:00 Lunch

1:00 General Session: Marketing Overview

2:00 **3RD SESSION:** _____

3:15 **4TH SESSION:** _____

6:00 **360 VIEW RELEASE PARTY** (dinner and drinks, location TBD- casual attire - 21 & up)

Yes, I'll be there. Number of guests _____. (do not include other conference attendees)

No, I will not be attending.

TUE. AUG. 10

8:00 Breakfast

8:30 General Session: The Power of Social Media

9:30 **1ST SESSION:** _____

10:45 General Session: 360 View User Roundtables: A Networking Event

12:00 Lunch

1:00 **2ND SESSION:** _____

2:00 **3RD SESSION:** _____

3:30 **4TH SESSION:** _____

WED. AUG. 11

8:00 Breakfast

8:30 General Session: They Are Your Best Customer, Reward Them for Dear Sake!

9:30 **1ST SESSION:** _____

10:45 General Session: The Future Is So Bright They Have To Wear Shades

12:00 **End of Conference**

MARKETING TRACK SUGGESTIONS

Monday

- 9:30-10:30 Exploring the Western Expansion of 360 View Activities and Contacts
- 10:45-12:00 Customer Letters On the Fly: No Way, Yes Way!
OR Profitability for Joe Six-Pack: The Non-CFO Version
- 2:00-3:00 Marketing: It's All New Folks!
- 3:15-4:30 Marketing: It's All New Folks! (continued)

Tuesday

- 9:30-10:30 Dr. Way's Marketing Lab **OR** SmartPops, SmartyPants: It's All Grown Up!
- 1:00-2:00 Cross-selling: Real Strategies to Take Home to Mom
- 2:00-3:15 Dr. Way's Marketing Lab **OR** SmartPops, SmartyPants: It's All Grown Up!
- 3:30-4:30 Making Incentives Work for You: A Little Shop of Motivation

Wednesday

- 9:30-10:30 No More Snail-Mail, Email!

SALES TRACK SUGGESTIONS

Monday

- 9:30-10:30 Exploring the Western Expansion of 360 View Activities and Contacts
OR A Grab-Bag of All Things 360
- 10:45-12:00 Customer Letters On the Fly: No Way, Yes Way!
OR Profitability for Joe Six-Pack: The Non-CFO Version
- 2:00-3:00 Exploring the Western Expansion of 360 View Activities and Contacts
OR We All Need a Little Help From Our Friends: Top 360 View Support Questions
- 3:15-4:30 You Have the Tools: Do You Have the Right Sales Strategy?

Tuesday

- 9:30-10:30 A Grab-Bag of All Things 360 **OR** SmartPops, SmartyPants: It's All Grown Up!
- 1:00-2:00 Cross-selling: Real Strategies to Take Home to Mom
- 2:00-3:15 Pipeline, Incidents, & Referrals, Oh My!
OR We All Need a Little Help From Our Friends: Top 360 View Support Questions
- 3:30-4:30 Making Incentives Work for You: A Little Shop of Motivation

Wednesday

- 9:30-10:30 Mini-Whiteboard for Incentives **OR** No More Snail-Mail, Email!

CRM MANAGEMENT TRACK SUGGESTIONS

Monday

- 9:30-10:30 A Grab-Bag of All Things 360
- 10:45-12:00 Customer Letters On the Fly: No Way, Yes Way!
OR Under the Hood: Maintaining the 360 View Engine
- 2:00-3:00 Exploring the Western Expansion of 360 View Activities and Contacts
- 3:15-4:30 Pipeline, Incidents, & Referrals, Oh My!

Tuesday

- 9:30-10:30 SmartPops, SmartyPants: It's All Grown Up!
- 1:00-2:00 Widgets: Why Aren't You Using 'em?
- 2:00-3:15 We All Need a Little Help From Our Friends: Top 360 View Support Questions
- 3:30-4:30 Making Incentives Work for You: A Little Shop of Motivation
OR Under the Hood: Maintaining the 360 View Engine

Wednesday

- 9:30-10:30 Customer Letters On the Fly: No Way, Yes Way! **OR** No More Snail-Mail, Email!

Classes listed in alphabetical order.

A Grab-Bag of All Things 360

James Algood

During this session, we will highlight little gems that make a big impact from the grab-bag of all that is 360 View. You will learn about the new look of 360 View, theme options that will help you motivate usage and branding, quick search functions, help menu additions, and much more. Don't miss this class, especially if you believe the little stuff in life really does matter.

Analytics: How 360 View Uses Them and How You Can Too

Andy Daniel, Customer Intelligence

This session will discuss the current analytics within 360 View for attrition and next likely product suggestion, custom analytics commonly used by financial institutions, and the future of analytics within 360 View.

Cross-Selling: Real Strategies You Can Take Home to Mom

David Acevedo

Join this session and learn the best practices for creating and sustaining a profitable cross-sell program, cross-sell strategies for different customer segments, and how to support your marketing effort with the right cross-sell program. This session will cover cross-sell tracking and measurements as well as cross-sell goals and incentive plans.

Customer Letters on The Fly: No Way, Yes Way!

Michael Hopkins/Sergei Temkin

Many of you asked for it; now you've got it. This session will teach you how to create "on the fly" customer or prospect letters direct from Activities. You will learn how to create templates where these letters can be used throughout 360 View and how to save, share, and print 360 View letters.

Don't Be Delinquent for Delinquency Management

Kevin Anderson

This session is devoted to a detailed overview of best practices in Loan Past Due and DDA Overdraft collections using 360 View Delinquency Management modules as a basis for this discussion. This session will teach you how to better track and report on your past due loans and DDA overdrafts while teaching you how to set up and print loan and overdraft collection letters using the letter template system.

*****Dr. Way's Marketing Lab**

Waylon Envik/Ben Stein

This will be a "hands-on" session where users get to create campaigns using the new 360 View Campaign Marketing system based on actual campaign submissions from fellow attendees. Once registered for this class, you will be contacted for campaign suggestions. A select number of the campaign submissions will be used during this class to create the actual campaign.

*****This session serves a part of the 2010 SR1 Requirement Certification for upgrade.**

Exploring the Western Expansion of 360 View Activities and Contacts*Chelsea Daniel*

Activities and contacts are at the center of the 360 View engine. This session will help you better connect with your customers and prospects utilizing the existing and many new functions of 360 View Activities and Contacts.

General Session — 360 View User Roundtables: A Networking Event

After every 360 View User Conference, you always ask for more opportunities to network with and learn from other attendees. This general session will allow you to do just that. You will have the opportunity to share experiences with other 360 View Users in a series of roundtable discussions. Each roundtable will be facilitated by a 360 View employee. You will be able to rotate from time-to-time so that you can participate in various topics of interest to you.

***** General Session — Marketing Overview***Waylon Envik/Chelsea Daniel*

This session will provide you with an understanding of the key components of the new 360 View Campaign Marketing. You will learn how the new system uses Campaigns, Offers, Steps, Actions, and Conditions to create a visual process flow for each marketing campaign. You will also learn of the new and enhanced role of Lists. This session is designed to give you the “big picture” of what we think will become a “big deal” in your future marketing efforts.

***** This session serves a part of the 2010 SR1 Requirement Certification for upgrade.**

General Session — The Future Is So Bright They Have To Wear Shades*Waylon Envik and Dev Team*

Waylon Envik, VP of Software Solutions for 360 View CRM and members of the Dev Team will discuss the future of the 360 View Software. They will provide insights into future technologies they will be utilizing, provide a recap on the last development process, review major additions within 2010 SR1, and preview future development initiatives.

General Session — The Power of Social Media*Susan Guess, SVP/Marketing Director The Paducah Bank and Trust Company*

Susan will discuss social media such as Facebook, Twitter, LinkedIn, and YouTube and its effect on their relationships and community building efforts at The Paducah Bank and Trust Company. This will be a lively interactive session that will benefit anyone interested in dipping their toe in murky water of social media.

General Session — They Are Your Best Customer, Reward Them For Dear Sake!*Kevin Anderson/Waylon Envik*

This general session will present and discuss 360 View's first implementation of a Customer Rewards Program. You will learn how we track balance threshold, ACH and Debit transactions, and other items to determine what level of account rewards each customer will receive.

Making Incentives Work For You: A Little Shop of Motivation

David Acevedo

This session will discuss the 360 View Standard Goal & Incentive Tool in detail. You will get an overview of the tool and its flexibility while seeing how easy it is to set up and get started using at your institution (in many cases, in as little as a few days). The Goal & Incentive Tool is a key component to your CRM strategy -- it helps keep employees motivated and up-to-date on their results and financial opportunities. If you want to drive results, you won't want to miss this session

*****Marketing: It's All New Folks!**

Waylon Envik/Ben Stein

This will be an detailed training session on the new 360 View Campaign Marketing release.

*****This session serves a part of the 2010 SR1 Requirement Certification for upgrade.**

Mini-Whiteboard for Incentives

David Acevedo

All current users of the Standard Goal & Incentive Tool are encouraged to participate in this mini-whiteboard committee meeting. You will provide valuable input into the further enhancement of the Standard 360 View Goal & Incentive Tool. Bring your ideas and we will brainstorm, and together we will...well, make the Standard Tool not so Standard!

No More Snail-Mail, Email!

Chris Green/Rebecca Key

This session will discuss the 360 View Email Fulfillment Tool. You will learn how to import customer/campaign lists, choose email templates, customize templates, insert tracking links, and how to review and use your campaign response for future follow up in 360 View Campaign Marketing.

Pipeline, Incidents, and Referrals, Oh My!

Joyce Colin

This workshop will focus on building, structuring and creating your sales and service processes in pipelines, incidents, and referrals to make each more effective at your organization. You will learn not only user functionality within the system, but parameter setup as well. More importantly, we will discuss the sales and service processes that must be present to support the successful launch of each and how these tools will aid in increasing your bottom line.

Profitability for Joe CFO: The CFO Version

Terry Bellenfant/Chris Green

This detailed training session on 360 View Profitability is designed to go behind the scenes on profitability to show how you can have Funds Transfer Pricing, Loss Provision, Cost Allocation, and Relationship Householding all play together to get the best measure of Customer and Account profitability.

Profitability for Joe Six-Pack: The Non-CFO Version*Chris Green/Terry Bellenfant*

This class is not intended to show you how to determine customer profitability, but, rather, to discuss the many ways profitability data can be used within 360 View for segmentation, marketing, widgets, and reporting. If you are a CFO, you will benefit too, and if you aren't, then this class will be right up your alley.

Smart Pops, Smarty Pants: It's All Grown Up!*David Seger*

You will learn to configure SmartPops for Teller use, how to create SmartPops Alerts, about the varying Alert Types, what the daily user experience will be like, and get a peek into the future of SmartPops.

Under the Hood: Maintaining the 360 View Engine*Chelsea Daniel/James Algood*

This session will dig into the many parameters, old and new, that drive all the functionality of 360 View. Key parameter forms (Activity Administration, Activity Editing, New Relationship Editing, New Incident Status, New Employee Exit Form, Account Detail Fields, Themes, and more) will be discussed as often hidden functionality is unveiled. If you already think you know everything 360 View can do, take this class and learn a few tricks that will really make your system hum.

We All Need a Little Help From Our Friends: Top 360 View Support Questions*Misty Hollamby*

The 360 View Support Team will discuss some of the most common support questions and a few not so common ones too. You will learn how to better help your user base when they have questions about 360 View and how to avoid falling in some of the familiar support-pits others seem to fall into often.

Widgets: Why Aren't You Using 'em?*Joyce Colin*

Attend this session and learn how to enhance your user experience through 360 View Widgets. Widgets are graphical representations of 360 View objects grouped together to provide more meaning and timeliness. You will learn how to turn-on and take advantage of the 360 View Dashboard technology already available to you in the 360 View system. In addition, we will discuss the standard widgets and teach you how to make them available to your employees based on their role or job responsibility.

You Have The Tools: Do You Have The Right Sales Strategy?*David Acevedo*

Too often we implement a CRM system before we have the right sales strategy in place. This session assumes you did just that and will cover the key sales strategy concepts that you can take back to your management to help develop or redevelop a sustainable sales program that utilizes the power of 360 View to ensure your institution optimizes your investment in CRM technology.