THE **VIEW** 2016

AGENDA-at-a-GLANCE

Monday, May 2, 2016

Time			
8:00 – 9:00	**Registration & Breakfast** (provided in Bredesen Room)		
9:00 – 10:30	Welcome 360 View Next Gen—To Boldly Go Where No CRM Software Has Gone Before!		
	15 Minute Break		
10:45 – 11:45	**Customer Merging & Mapping: How to Keep Your 360 View System Duplicate Free**	**Marketing 101**	**Next Gen Town Hall Session 1**
11:45 – 1:00	**LUNCH** (provided in Atrium)		
1:00 – 2:00	Report Writer—Out of Beta and Ready for the Main Stage		
2:00 – 3:00	**Drag and Drop – Using the Report Writer**	**How to Reintroduce Your CRM to Your Team**	**Next Gen Town Hall Session 2**
	15 Minute Break		
3:15 – 4:30	"Yeah, That's a Thing"– Networking Session		
5:30 – 9:30	**360 View Monday Night Event** Museum Tour, Rooftop Dinner and Live Music at the George Jones Entertainment Complex		

Tuesday, May 3, 2016

Time			
7:30	**Executive Team Breakfast** (sign-up at Registration Desk)		
8:00 – 9:00	**Breakfast** (provided in Bredesen Room)		
9:00 – 10:30	Day 2 Kick-off 360 View Actionlytics—A Preview of How You Can Put Your Data to Work for You!		
	15 Minute Break		
10:45 – 11:45	**Hidden Gold**	**Marketing 201**	**Next Gen Town Hall Session 3**
11:45 – 1:00	**LUNCH** (provided in Atrium)	**Executive Team Lunch** (sign-up at Registration Desk)	
1:00 – 2:00	**Tracking Your Past Dues**	**Technology Change Requires Culture Change**	**Next Gen Town Hall Session 4**
2:00 – 3:00	**Using Onboarding Campaigns to Deepen New & Existing Relationships**	**The Many Ways You Can Report Using Profitability Data**	**Next Gen Town Hall Session 5**
	15 Minute Break		
3:15 – 4:00	Knowing your Usage Stats Closing Remarks (and some fun!)		

☐ All General Sessions in **Bredesen Room**
☐ Breakout Sessions in **Bredesen Room**
☐ Breakout Sessions in **McKissack 2**
☐ Next Gen Town Hall in **McKissack 3**

AGENDA for MONDAY, MAY 2

8:00 am **Breakfast for All Attendees**   *Location:* Bredesen Room
Registration Opens

9:00 am **Conference Welcome**   *Location:* Bredesen Room

9:30 am **360 View Next Gen – To Boldly Go Where No CRM Software Has Gone Before!**
Presenter: Waylon Envik   *Location:* Bredesen Room

We have a re-visioning of the 360 View software already underway and we want to share with you the early glimpses of what we affectionately call Next Gen! This general session led by our SVP of Software Solutions will guide you through an overview of the future direction of the software. You will learn our team's strategic vision for mobile-design, 3rd party integration, custom work-flows, user experience and design, and much more. We will also cover some of the significant recent release features of the 360 View software, our development plans for the next two to three years, and what this all means to you!

10:30 am **15 Minute Break**

10:45 am *Concurrent Sessions*

Customer Merging & Mapping: How to Keep Your 360 View System Duplicate Free
Presenter: Kevin Anderson   *Location:* Bredesen Room

Just like you perform regular maintenance on your car, you need to perform regular maintenance on your CRM! This breakout session will cover best practices for ridding your CRM of duplicate records. The number one cause of duplicate records in 360 View is the manual or auto import of prospects or purchased marketing lists. You will learn how to safely enter new prospects, use the 360 View Customer Merge feature to regularly clean your data, and how to utilize features like tax-id or address exclusions to prevent further duplicate records in your CRM database. This is a must attend for the long term integrity of your CRM data.

Marketing 101
Presenters: The Project Management Team   *Location:* McKissack 2

The 360 View Marketing system is a robust tool that will help you unleash the power of your data to create better sales and marketing campaigns. This breakout session will teach you the basics of 360 View Marketing and is meant for those unfamiliar with 360 View Marketing. Members of the 360 View Project Management team will help you learn how to create customer and account lists, how to assign these lists to groups, how to use marketing lists to feed campaigns and SmartPops, and how to create very simple onboarding campaigns. This session is a must for the novice 360 View marketing user.

Next Gen Town Hall Session 1
Presenters: Next Gen Development Team   *Location:* McKissack 3

This breakout session will allow for a more intimate and detailed discussion of Next Gen during which you will interact with our development team to provide feedback on specific initiatives, concepts, and how you use the system today. This is an opportunity to sit at the table with 360 View developers as they decide key requirements for the future development of Next Gen. Each of these "town hall" sessions will be limited as to the number of participants in order to keep each session manageable and meaningful, but with several sessions offered, there should be ample opportunity to participate.

11:45 am **Lunch** - *provided downstairs in the Hilton Atrium*

AGENDA for MONDAY, MAY 2

1:00 pm **Report Writer—Out of Beta and Ready for the Main Stage**
Presenter: David Acevedo   *Location:* Bredesen Room

You've heard of it, maybe even seen a demo of it, but now that it's officially out of Beta Release, join us for this tour de force overview of the 360 View Report Writer. This general session will cover everything from basic navigation to the underpinnings to the many uses for this growing-in-popularity 360 View complement. 360 View "power users" will even join in this presentation to show samples of reports that they created using Report Writer to help with Sales, Service and even Compliance.

2:00 pm *Concurrent Sessions*

Drag and Drop—Using Report Writer
Presenters: David Acevedo and Chris Bunch   *Location:* Bredesen Room

Can you drag and drop? If so, then you can write the report of your dreams using 360 View Report Writer. This breakout session will help free you from the world of standard reports and teach you how to build the reports you and your team want. During this session we will actually walk you through the process of building useful reports and send you home better able to write reports on your own!

How to Reintroduce Your CRM to Your Team
Presenters: Joyce Colin and Holly Ahearn   *Location:* McKissack 2

Sometimes to regain momentum and increase buy-in you may need to reintroduce your CRM to your users. This breakout session will focus on how to do just that. Whether you are a new user or an existing user, you will learn new strategies of how to keep your CRM system relevant to your user base. We will discuss how keeping your users up to date on the latest 360 View enhancements can increase overall usage, retraining team leads and core users more regularly can build stronger internal cheerleaders for CRM, involving team leaders in regular system maintenance can help uncover new uses for CRM, relaunching existing processes such as referrals or incidents with updated work-processes can change acceptance, re-branding your software can aid in creating a sense of collective pride and ownership among your user base, and establishing a CRM Committee to regularly review team needs and system usage is the number one thing you can do to build buy-in for CRM.

Next Gen Town Hall Session 2
Presenters: Next Gen Development Team   *Location:* McKissack 3

3:00 pm **15 Minute Break**

3:15 pm **"Yeah, That's a Thing"—Networking Session**
Presenters: The 360 View Team   *Location:* Bredesen Room

Chatting together you'll learn a few things
Activities, referrals, you'll soon feel like kings
But don't get too confident with humor and wit
For in this fun session you'll put on a skit
Have no fear as 360 is here
To build better relationships with those far and near!!

4:30 pm **End of Day 1**

---

360 View Monday Night Event at the George Jones Entertainment Complex
128 2nd Ave N, walking distance from the Hilton

5:30 pm - The George Rooftop Bar Opens with DJ Dan
6:30 pm - Dinner
7:00 pm - Live Band
Tour the George Jones Museum on the 2nd floor any time before 10pm.

AGENDA for TUESDAY, MAY 3

7:30 am   **Executive Team Breakfast**   *Location:* Jubilee Boardroom

Sign up to have breakfast with the 360 View Executive Team. Open to any attendee but there are only 8 spots available. See Heather at the Registration Desk to put your name on the list. (One attendee per bank please.)

8:00 am   **Breakfast for All Attendees**   *Location:* Bredesen Room

---

9:00 am   **Day 2 Kick-off**   *Location:* Bredesen Room

360 View Actionlytics – A Preview of How You Can Put Your Data to Work for You!
Presenters: Chris Green and Brian Bankert   *Location:* Bredesen Room

This general session will explore the future of 360 View Analytics, or what we like to call Actionlytics. You will learn about big data, data enrichment, statistics, and how and why 360 View is building an analytical capability that will put your data to work for you. We will explore the various sources we will be using to enrich your customer data, how we will be using data to create modeling that will benefit you in better knowing your customers, and addressing the legal and security concerns that come with analytics and big data.

10:30 am   **15 Minute Break**

10:45 am   *Concurrent Sessions*

Hidden Gold
Presenter: Holly Ahearn, Lindsey Bradley, and Keith Twisdale   *Location:* Bredesen Room

There are so many 360 View system features that often get overlooked among the mounds of the most used or obvious. This breakout session will help you uncover the little nuggets of gold that lie buried within 360 View that when unearthed and brought into everyday practice will bring big smiles to the faces of your users. Here is just an example of some of the items this session will cover – how to leverage the "add link" function; how you can use "quick search" parameters to change how it searches for more powerful results; how to use "private comments"; how to subscribe to an item or customer; and how you can make the new 360 View logo theme the default for your system. So, join our team as we share these nuggets and more from our personal collections in an effort to show you how small tweaks to your system parameters or unearthing features you didn't even know were present can leave you rich in praise from your users.

Marketing 201
Presenters: The Project Management Team   *Location:* McKissack 2

You should already be familiar with the 360 View Marketing system to attend this breakout session where you will learn how to create more complex campaigns than what was covered in the Marketing 101 breakout session. Members of the project management team will teach you best practices on how to set up successful campaigns in 360 View. The Project Management team will accept submissions prior to the conference of actual campaigns you would like to see covered during this session. From these submissions, several will be chosen and will actually be set up during the live session. You will receive detailed instructional handouts for all campaigns covered during the session. This is a great session for any user wishing to get better use out of their 360 View marketing system.

Next Gen Town Hall Session 3
Presenters: Next Gen Development Team   *Location:* McKissack 3

11:45 am   **Lunch** - *provided downstairs in the Hilton Atrium*

Executive Team Lunch   *Location:* Jubilee Boardroom

Sign up to have lunch with the 360 View Executive Team. Open to any attendee but there are only 8 spots available. See Heather at the Registration Desk to put your name on the list. (One attendee per bank please.)

AGENDA for TUESDAY, MAY 3

1:00 pm   *Concurrent Sessions*

Tracking Your Past Dues
Presenter: Kevin Anderson   *Location:* Bredesen Room

This session will cover the benefits of the 360 View Past Due Module to your past due collection efforts. You will learn how to centralize and standardize the collection efforts of your loan officers in order to provide better follow-up, tracking, and reporting. We will cover how to track collection phone calls, create demand letters, and how your collection efforts can be kept private or shared. And from the Past Due Module you can quickly bounce out to the customer's entire account and relationship view for more information to aid you in your efforts. This session is for anyone wishing to get better acquainted with 360 View Past Due module.

Technology Change Requires Cultural Change
Presenters: Chris Green and Andrea Kowalisyn   *Location:* McKissack 2

Introducing new technology like CRM into your organization can be a cultural challenge. Most people are resistant to change, and often an entire organization can be resistant to change, especially when it involves technologies that require a "new way of doing things". This break out session will provide tips for addressing resistance you may experience from both your executive and employee teams when implementing CRM for the first time or when implementing any new process that requires change. We will discuss real-life situations and strategies that will help you better understand how to motivate employees and teach new behaviors that stick!

Next Gen Town Hall Session 4
Presenters: Next Gen Development Team   *Location:* McKissack 3

2:00 pm   *Concurrent Sessions*

Using Onboarding Campaigns to Deepen New & Existing Relationships
Presenter: Elyse Richmann, *Elevation 43*   *Location:* Bredesen Room

There are so many possibilities when it comes to onboarding customers. Some of these include using trigger-based feeds, assigning follow-up activities with clients throughout the first year, increasing cross sell ratio through SmartPops and other touch points, automating lists for email/mail marketing, and the ability to track and report results. Your program can ultimately deepen the customer relationship and increase ROI for the financial institution. You will hear other 360 View users, who have built successful onboarding campaigns, share their ideas on what has worked and the impact these campaigns have had at their financial institution.

The Many Ways You Can Report Using Profitability Data
Presenter: Terry Bellenfant   *Location:* McKissack 2

This breakout session will explore the many methods of reporting that are available to you when you use 360 View Premier Profitability. You will learn how to leverage your profitability data through widgets, standard reports, and custom reports you can create yourself by using 360 View Report Writer. We will explore creating graphs, how to create reports using marketing lists, reports specifically for management, and much more. This session is great for anyone who already has 360 View Premier Profitability licensed or anyone wishing to just learn more about the power of 360 View reporting and profitability.

Next Gen Town Hall Session 5
Presenters: Next Gen Development Team   *Location:* McKissack 3

3:00 pm   **15 Minute Break**

3:15 pm   **Knowing your Usage Stats**
Presenter: Kevin Anderson   *Location:* Bredesen Room

3:30 pm   **Closing Remarks (and some fun!)**