



LEADERSHIP Unplugged

MARCH 7 - 9 | PHOENIX, AZ

New Sessions Added Daily

SMALL BUSINESS BANKING FORUM

FORUM SPONSOR:

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[Dun & Bradstreet](#)

Monday, March 07, 2016

9:00 AM - 10:00 AM

Location:
Grand Sonoran C-D

Deep Dive Workshop

EMERGING WEALTH TRENDS

Join us for a discussion on the latest trends in wealth management:

- What are some of the impacts of emerging wealth trends on consumer banking and investing habits?
- How have investing behaviors changed in the wake of the Great Recession and why?
- What differences can be observed in various sectors of the population, whether by wealth or by geography?
- How can you use this understanding to more effectively extend existing customer relationships and target new prospects?

Don't miss this opportunity to learn more about the latest wealth trend data

information that can help you improve the success of your marketing programs.

Speaker(s):

Isio Nelson, *Emerging and Differentiated Services*, Equifax

Sponsor(s):

Premier: Equifax

2:45 PM - 3:55 PM

Location:
Grand Sonoran C-D

Small Business Financial Exchange: A Comprehensive View of Lending Trends

Explore current portfolio trends on a macro level with additional insight into regional and business type trends. Attendees will hear from leading industry executives about the drivers of these trends and what your peers see as opportunities and challenges in 2016 and beyond.

Speaker(s):

Bodhisattva Ganguli, *Senior Economist*, Dun & Bradstreet

Gregory Johnson, *Head of Business Relationships*, Small Business Card, Capital One Bank

Kenna Short, *Segment Credit Officer*, KeyBank

Moderator: Carolyn Hardin-Levine, *CEO*, Small Business Financial Exchange

4:00 PM - 5:00 PM

Location:
Grand Sonoran C-D

Big Data and Predictive Analytics - Improving Productivity and Sales

Are you using 'big data' effectively? This session will unpack the buzzword and explore current use cases for big data and predictive analytics in the banking industry. Learn how banks can leverage their web sites through content marketing, effectively utilize social media, and employ cutting edge technology to drive sales and improve credit performance.

Speaker(s):

Frank Aloï, *President and Chief Executive Officer*, ath Power Consulting

Andrew Garvin, *Senior Vice President*, Strategy, Radius

Nick Miller, *President*, Clarity Advantage

Moderator: Gail Gandy, *Senior Vice President*, Business Real Estate Financing, Wells Fargo Bank, N.A.

Tuesday, March 08, 2016

10:10 AM - 11:10 AM

Location:
Grand Sonoran C-D

Click or Brick: Serving the Small Business Customer in the Digital Age?

As electronic payments become the norm, business owners - like consumers - expect to pay their bills wherever, whenever, and however they choose. In the age of rapidly changing technology, will business owners look to access their smartphone, tablet or laptop to make bill and loan payments? How should financial institutions prepare to serve the changing needs of their customer base? Attend this session to learn how banks are leveraging electronic bill payment and presentment to enhance customer relationships and support institutional strategy.

Speaker(s):

Gary Brand, *Director, Payment Strategies*, Fiserv
Victoria Lant, Fiserv

11:40 AM - 12:40 PM

Location:
Grand Sonoran C-D

Is the Small Business World Ready for Millennials, Inc.?

An increasing number of Millennials believe they do not need banks to fulfill their financial needs. This session will explore the current landscape of small business services and discuss how banks can appeal to Millennial customers. We will also examine how banks can better provide the small business banking services and channels that Millennials expect from the industry.

Speaker(s):

David Potterton, *Director, Business Banking*, Digital Insight, NCR Company

2:40 PM - 3:40 PM

Location:
Grand Sonoran C-D

Developing Sales Leaders to Drive Sales Transformation

Leading effective sales transformation is neither easy nor simple. This session will examine the five most common derailers of successful sales transformation and discuss how lenders can overcome these challenges to become the drivers of breakthrough. Explore how to choose and develop the right leaders to ensure future success in sales transformation.

Speaker(s):

Kenneth Connell, *Executive Vice President, Business Banking Sales Director*, Huntington Bancshares Incorporated
Linda Maxwell, *Chief Executive Officer*, Business Efficacy Inc.

4:15 PM - 5:15 PM

Location:
Grand Sonoran C-D

Non-Bank Lenders: Build, Buy, Partner, or Ignore

Non-bank lenders have been making a noticeable impact on the small business lending market. Every bank must make a decision to either buy, build, partner or ignore. This session will feature a perspective on the fintech boom and thoughts from leaders who are taking steps to both preserve and accelerate their business model. Listen in as a diverse panel of experts discuss this fast moving sector and provides guidance to help formulate your bank's strategic response.

Speaker(s):

James Hobson, *Chief Operating Officer*, OnDeck

Linda O'Connell, *Managing Director, Small Business Banking*, Barlow Research Associates, Inc.

Andres Wolberg-Stok, *Director, Citi FinTech*, Citigroup Inc.

Moderator: Lonnie Hayes, *Executive Vice President-Executive Director Small Business Segment Group*, BBVA Compass

Wednesday, March 09, 2016

7:50 AM - 8:50 AM

Location:
Grand Sonoran C-D

Succession Planning: Stop Leaving Your Legacy to Chance

How do your employees become trusted advisors to your customers? Immense value and long-lasting loyalty can be established between customers and banks if you have the proper conversations early on when succession planning.

Speaker(s):

Randy Long, *Chief Executive Officer*, Long Business Advisors, LLC

Betty Rengifo Uribe, *Executive Vice President, Division Head, Business and Personal Banking*, California Bank & Trust

9:00 AM - 10:00 AM

Location:
Grand Sonoran C-D

Streamlining the Credit Experience

In today's competitive environment for small business lending, a highly efficient end-to-end process is paramount to serving the credit needs of small business owners. Clients expect quick loan decisions, an easy closing process, and prompt access to their funds. Hear from a panel of leading small business credit professionals about how they have adapted their processes to ensure their organizations remain focused on the client experience while maintaining discipline in the credit process.

Speaker(s):

Richard Foster, *Executive Vice President*, Frost Bank

George Glines, *Senior Vice President, SME Business Lending Division Manager*, Bank of the West

Moderator: John O'Connor, *Partner*, Praxis Advisors, LLC

