

# 2015 User Conference Agenda

| Wednesday, October 21st |  |
|-------------------------|--|
| 7:30 – 9:00             | Registration and Continental Breakfast   |
| 9:00 – 9:30             | Opening Remarks and Introductions (Dave)   |
| 9:30 – 10:30            | Keynote Address and State of Cforia (Chris)  |
| 10:30 – 10:50           | - Break -  |
| 10:50 – 12:00           | Product Roadmap (Dave)   |
| 12:00 – 1:00            | - Lunch -  |
| 1:00 – 2:00             | Introduction to C2! Cforia.Connect (Dave)  |
| 2:00 – 2:30             | Cforia Connect and Online User Community (Jill)  |
| 2:30 – 2:45             | Customer Success Stories <ul style="list-style-type: none"> <li>➤ Renee Hart – MTD Products - Paperless Deductions</li> </ul>  |
| 2:45 – 3:00             | - Break -  |
| 3:00 – 3:45             | Deductions Roundtable and New Feature Discussion (Dave/Chris/Dima)   |
| 3:45 – 4:30             | Zero-Touch Customer Collections and Payments (Chris)   |
| 6:30 – 8:30*            | Cforia Casual Cocktail Party – Tiffany Terrace<br><i>*Sponsored by:</i><br><b>CASHBOOK</b><br> |

| Thursday, October 22nd |  |
|------------------------|--|
| 7:30 – 9:00            | Registration and Continental Breakfast   |
| 9:00 – 10:00           | The 10 Best Practices in Order to Cash (Bradley Palmer)  |
| 10:00 – 10:30          | Customer Success Stories <ul style="list-style-type: none"> <li>➤ Shaun Papperman – Baltimore Aircoil</li> <li>➤ James Sarkkinen – Interstate Companies</li> </ul> |
| 10:30 – 10:50          | - Break -  |
| 10:50 – 12:00          | Rules, Templates and Planning (Chris/Dave/Dima)  |
| 12:00 – 1:00           | - Lunch -  |
| 1:00 – 1:45            | Demo of Executive Dashboard (Denise/Marcus) <ul style="list-style-type: none"> <li>➤ Jennifer Zoltan – Assa Abloy – Cforia Executive Dashboard</li> </ul>          |
| 1:45 – 2:45            | MI2 Query Templates and Reporting (Dave/Denise)  |
| 2:45 – 3:00            | - Break -  |
| 3:00 – 5:00            | Customer Roundtable  |

| Friday, October 23rd |                                 |
|----------------------|---------------------------------|
| Optional             | FUN Day at Disneyland Resort!!! |



## **DAY ONE – SESSION DESCRIPTIONS:**

### **Opening Remarks and Introductions (Dave McIntyre)**

Dave will kick off the conference by managing the introductions of the attendees and guests.

### **Keynote Address (Chris Caparon)**

Chris will be reviewing the past year at Cforia and the exciting new partners have brought on board. He will also review the new trends in accounts receivable and what Cforia's strategy is to keep everyone ahead of the curve.

### **Product Roadmap (Dave McIntyre)**

Dave will review the features added to the AS400 and SQL versions of MC2 in this past year, and provide a roadmap for continued product improvement in both versions for the coming year.

### **Introduction to C2 – Version 8.0 is Here! (Dave)**

Cforia is launching our long awaited web-version of the AR Workbench. Version 8.0 will be entirely browser based and Dave will demonstrate the enhanced features to the user community. Dave will also be discussing the next phases of the Cforia product roadmap.

### **Cforia Connect and Online User Community (Jill)**

Cforia Connect and the online user community provide a new platform for customer self-service in the area of support and reports. Cforia connect will allow users to upload/download and share their favorite reports. No longer will you need to "start from scratch" when creating your reports. Jill will give a demo on the website's uses and demonstrate how to download and share MI2 report templates with your peers.

### **Deductions Round Table and New Feature Discussion (Dave/Chris/Dima)**

There are key pain points that Cforia has focused on addressing in the deduction area. See the new enhancements that have been added in this last year and learn how they can benefit your implementation. Are you effectively communicating with the field? Chris will demo the Deduction Collaboration Portal.

### **Zero Touch Customer Collections and Payments (Dave)**

Cforia has continued developing best practices around small account management. This session will focus on maximizing the number of customers that can be managed by a collector. The goal is to move account management from people to electrons. We will explain how to move a customer from delinquency to automated cash application without any collector intervention.

### **Cforia Casual Cocktail Party\***

Join the Cforia Team & fellow Users in the Tiffany Terrace for this outstanding networking opportunity. Beverages & light appetizers will be served.

*\*Sponsored by:*  
**CASHBOOK**



## **DAY TWO – SESSION DESCRIPTIONS:**

### **The 10 Best Practices in Order to Cash (Bradley Palmer)**

Bradley will be discussing the 10 best projects that you can do to make a material impact on your AR performance. These projects will deliver a hard dollar benefit to your companies.

### **Rules/Templates and Planning (Chris/Dave/Dima)**

A critical component of AR automation is resource loading and determining which methodology is optimal for prioritization. Cforia has two prioritization methodologies currently. This session will discuss what best practices are being used currently and how best to deploy them in your companies. Additionally, the session will cover the road ahead and what new features are going to be delivered in the new version.

### **Demo of New Dashboard (Denise/Marcus)**

Cforia is announcing a new enhanced executive dashboard module that runs via the web. It is designed for financial executives to view critical AR data with the click of a mouse. The dashboard is designed to be easy to use, configurable by the user and deployed with minimal training. Denise and Marcus will walk you through the major features of the dashboard and discuss the road ahead.

### **MI2 Query Templates and Reporting (Dave/Denise)**

Review of the MI2 Report writer. Feature enhancements that have been added in the last year, and a look at how to get the most out of the MI2 application. See the new features that are planned for the coming year and provide input on what you would like to see.

### **Customer Roundtable**

To conclude the conference, we will give each attendee the opportunity to speak directly with the development team and discuss what they would like to see in the product. This is the most important session in the conference. Within a few short months, many of the requests are often delivered. Take the opportunity to share in the development of the product.