

Digital Insight National Conference Session Details

Saturday March 13, 2010

1:00pm - 5:00pm

Conference Registration

Sunday March 14, 2010

7:00am - 6:30pm

Conference Registration

7:00am - 3:30pm

Extracurricular Activities



**Digital Insight Golf
Tournament at the TPC San
Antonio**

[Click here for more
information](#)



**Colorful Highlights of San
Antonio**

[Click here for more
information](#)



**Natural Bridge Caverns &
Historic Gruene**

[Click here for more
information](#)

sponsored by



8:00am - 10:00am

Digital Insight University Classes (Your choice of the following topics)

Generating Reports with Management Console

Digital Insight provides you access to a wealth of information about your online banking products and how your customers/members use them. This session will explore common scenarios that require creating, downloading and saving a detailed report. During this session you will learn about:

Using reports to assist with registration

Creating reports for auditing purposes

Using Email Manager to reach inactive users

Assisting end users with troubleshooting

Train your staff and drive Online Banking active use

Create your own in-house online banking training program to engage and prepare your front-line staff to sell and support your online banking products. During this session you will learn about:

Creating a training plan for your financial institution

Discovering the tools and materials available to you from Digital Insight to create your training

Recognizing and acting on sales opportunities

Learning training best practices

8:00 - 9:00 am

Solution Spotlights

Internet Banking

Discover what's new to help you delight your existing end users and attract new ones.

Online Account Open

Learn how to grow new deposits online, especially with Gen X & Y customers and members.

Small Business FinanceWorks + LaunchSmart

Know how to position your small business solutions, and profit from billing, banking and payroll all in one place.

9:00 - 10:00 am

Solution Spotlights

FinanceWorks + LaunchSmart

FinanceWorks end users are up to 4x more profitable. Learn how to mine them for growth within online financial management.

Business Financial Solutions

Gain the competitive edge with integrated accounting and online banking. Learn what's now and what's next.

Growth & Retention

Explore programs, campaigns and experiments in online marketing. Discover what works and doesn't.

10:00 - 10:30 am

Break

10:30 - 11:30 am

Solution Spotlights

Security - Consumer Focus

Understand current and emerging security threats and what you can do to stay protected.

Mobile

Mobile is going mainstream. Discover the implications for your institution and how to profit from this exciting trend.

Payments - (BP, A2A, MyDeposit)

Differentiate your services and increase your active customer base with robust payments solutions that save time and solve problems with ease.

10:30am-12:30pm

Digital Insight University Classes (Your choice of the following topics)**Maximize Digital Insight Support Services to Grow Your Business**

This session will de-mystify the self-service support options available to you to maximize your Digital Insight partnership and grow your business. During this session you will learn about:

MyDI: Incident logging and management, training, reports, forms and enhancement requests

Client Site/Gateway

LaunchSmart: Marketing and Training suite

Achieve Maximum Impact with Digital Insight Business Solutions

Give your customers/members the tools they need to grow their businesses -- all in one place - and, in return, grow your business. During this session you will learn about:

Configuring Business Banking with "right for me" packages that fit your business clients' needs.

Increasing your online channel profitability by maximizing the Small Business FinanceWorks opportunity

Delighting your business customers/members with value-add business banking solutions

Pre-requisite: Business Banking client. You do not have to have Small Business FinanceWorks or other added value business banking products to benefit from this session.

11:30 am - 12:30 pm

Solution Spotlights**Growth & Retention**

Explore programs, campaigns and experiments in online marketing. Discover what works and doesn't.

TurboTax Online Banking

Easy core deposit growth: ninety-four percent of pilot users direct deposited their average \$2,600 return with their provider financial institution.

Small Business FinanceWorks + LaunchSmart

Know how to position your small business solutions, and profit from billing, banking and payroll all in one place.

12:30 - 1:30 pm

Lunch

1:30 - 2:30 pm

Solution Spotlights

Consumer Connected Strategy (Internet Banking, FinanceWorks, TurboTax Online Banking)

Learn about Digital Insight's strategy to connect services for your consumers - making them more loyal to you for their financial needs.

Security - Business Focus

Understand current and emerging security threats and what you can do to stay protected.

Web Center

Acquire best practices for Web site design, development, management and optimization that drive adoption and active use.

2:30 - 3:30 pm

Solution Spotlights

FinanceWorks + LaunchSmart

FinanceWorks end users are up to 4x more profitable. Learn how to mine them for growth within online financial management.

Payments (BP, A2A, MyDeposit)

Differentiate your services and increase your active customer base with robust payments solutions that save time and solve problems with ease.

Deep Customers/Members Knowledge for Growth

Attend this interactive session to learn Design for Delight techniques that will help you gain deep customer understanding. Knowing your customers is the key to solving their most important financial jobs with ease... ahead of the market.

5:00 pm - 8:00 pm

Welcome Reception and Solutions Showcase



Monday, March 15, 2010

7:00 am - 6:00 pm

Conference Registration

7:00 am - 6:00 pm

Solutions Showcase

7:00 am - 8:00 am

Breakfast

8:00 am - 8:10 am

Opening Remarks: CeCe Morken

8:10 am - 8:35 am

**President's Remarks: Sasan Goodarzi****Driving Results in the New Normal**

Digital Insight President Sasan Goodarzi will share learnings from leaders of other innovative growth companies that are driving results in the new economic normal, plus offer insights on how to apply these best practices to compete and win against money center banks and non-bank entities.

8:35 am - 9:25 am

**Keynote Address: Steven Levitt and Stephen Dubner, Authors of SuperFreakonomics Steering to Success in the New Normal**

The co-authors of Freakonomics and the best selling SuperFreakonomics, Steven Levitt and Stephen Dubner will share their highly regarded views of what's now and what's next in this economic environment and what you can do to drive results.

9:25 am - 9:30 am

Conference Kickoff: CeCe Morken

9:30 am - 10:00 am

Break

10:00 am - 11:00 am

Solution Spotlight: FinanceWorks + LaunchSmart

FinanceWorks end users are up to 4x more profitable. Learn how to mine them for growth within online financial management.

10:00 am - 11:30 am

Round One: Growth Strategies

Consumer - Generating Fee Income in the New Normal

As overdraft and ATM fees diminish, where do you turn? Is there a solid working model for consumer fee income going forward? Obtain answers by attending this Growth Strategies session.

Consumer and Business - Profiting from Social Networking

Learn how social networking can improve your consumers' and small businesses' satisfaction and your profits.

Business - Maintaining Profitability as Expenses Grow

It is becoming more expensive to run your business in the new normal. Learn what your peers are charging for business services and how commercial innovation can help you reframe your value proposition so you can grow profitably.

11:30 am - 1:00 pm

Lunch and Networking

1:00 pm - 2:00 pm

Round Two: Instant Focus Group, Solution Spotlight and Partner Workshops

Consumer - Delighting Consumers in the New Normal

Talk to a panel of consumers (Xs, Ys, Boomers and Seniors) to understand how and why consumer behaviors and beliefs have changed as a result of the economic crisis.

Solution Spotlight Small Business FinanceWorks + LaunchSmart

Know how to position your small business solutions, and profit from billing, banking and payroll all in one place.



Partner Workshop

Optimize Your Profit Per Customer Through a Better Bill Pay Experience

Your active bill pay users are more profitable and committed. What would it mean to your bottom line if you could activate and retain more bill pay users through a better bill pay experience? Attend this workshop to understand what improvements we're making, the insights we are gaining through customer research and usability testing and our plans to help you optimize your profit per customer. Topics include:

Embracing new users

Understanding your customer's behavior

The innovation process and how it has driven results

This Workshop will be conducted by Craig Anderson, Senior Product Manager at FIS

[Read his bio here](#)



Partner Workshop

Driving ROI: Why Bill Pay Is An Imperative For Financial Institutions

Learn why Bill Pay should be an integral part of your ROI strategy. Join us as we share research findings that point to a "direct" relationship between using bill pay and e-bills and the impact of being more loyal and profitable to your financial institution. The study further establishes a strong relationship between bill pay and e-bill usage and awareness of additional banking products. We will also share industry best practices for promoting the value of bill pay and e-bills to consumers and how you can drive greater levels of adoption. The benefits and best practices for driving increased adoption and usage of bill pay and e-bills, include:

Lower attrition for online bill pay consumers

Higher profitability for your financial institution

Decreased attrition and increased profitability with each additional payment a consumer makes

This Workshop will be conducted by Justin R. Jackson, Senior Product Manager at Fiserv



Partner Workshop

How to Instill Customer/Member Confidence & Boost Web Site Results

Increasing the number of online customers or members and getting them to perform more transactions online continues to pose significant challenges for financial institutions across the board. One of the most common reasons behind any user's reluctance to bank online is perceived security weaknesses and the fear of identity theft.

In this interactive workshop, VeriSign experts will share their insights and best practices adopted by financial institutions to successfully overcome these challenges. You will learn:

How to show your customers/members that your Web site is secure while enhancing your online presence

Information on the latest SSL security-related threats and how to combat them

Best practice examples and case studies

2:00 pm - 2:30 pm

Break

2:30 pm - 3:30 pm

Solution Spotlight: TurboTax Online Banking

Easy core deposit growth: ninety-four percent of pilot users direct deposited their average \$2,600 return with their provider financial institution.

2:30 pm - 4:00 pm

Round Three: Competing to Win

Consumer - Activating Efficiency Strategies that Save Money

Cover every cost-cutting corner? Squeeze every operating statement? Discover how applying Intuit Design4Delight principles can help you make and save money.

Business - Competing and Winning Against Money Centers

Competition for small business is increasing. Compete and win with innovative pricing strategies and value-added services others can't offer. Obtain answers and ideas here.

Walking in Our Customers' Shoes

Understanding small businesses and consumers through traditional, non-traditional, and quantitative sources.

4:00 pm - 4:30 pm

Break

4:30 pm - 5:30 pm

Round Four: Instant Focus Group and Solution Spotlight

Business - Delighting Small Businesses in the New Normal

Talk to this panel of small business owners to understand how and why their behaviors and preferences have changed as a result of the economy.

Solution Spotlight

Security - Consumer Focus

Understand current and emerging security threats and what you can do to stay protected.

Solution Spotlights

Internet Banking

Discover what's new to help you delight your existing end users and attract new ones.

Solution Spotlights

Business Financial Solutions

Gain the competitive edge with integrated accounting and online banking. Learn what's now and what's next.

5:30 pm - 6:00 pm

Solutions Showcase and Networking

7:00 pm - 10:30 pm

Monday Night Boot Scootin' at the Buckhorn Saloon



[Click here for more information](#)

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Tuesday, March 16, 2010

7:00 am - 12:30 pm

Conference Registration

7:00 am - 2:00 pm

Solutions Showcase

7:00 am - 8:00 am

Breakfast

8:00 am - 8:10 am

Welcome Back: CeCe Morken

8:10 am - 9:00 am



Keynote Address: Rudy Giuliani

Leading in Hard Times

Former NYC Mayor and presidential candidate Rudy Giuliani will share his views on what it takes to lead in hard times and what the new normal holds in store as the country emerges from the financial crisis.

9:00 am - 9:15 am

Closing Announcements: CeCe Morken

9:15 am - 9:45 am

Break

9:45 am - 10:45 am

Solution Spotlight: Growth & Retention Services

Explore programs, campaigns and experiments in online marketing. Discover what works and what doesn't.

9:45 am - 11:15 am

Round Five: Delivering Delight

Consumer - Generating Revenue by Delighting your Xs, Ys, Boomers and Seniors

Discover how to delight your customers and members so they stay, buy more and tell their friends.

Business - Winning the Total Business Household

Be the primary financial institution and trusted advisor to your customers' total business household - business, personal and employees. Gain ideas to grow as they grow.

Business - Profiting from Specialization through Segmentation

Healthcare. Real estate. Professional services. Know who they are, what they do and how to profitably serve them. Specializing in vertical segments starts here.

11:15 am - 12:45 pm

Lunch and Networking

12:45 pm - 1:45 pm

Round Six: Instant Focus Group and Solution Spotlights

Business - Delighting Commercial Businesses in the New Normal

Talk to this panel of commercial business owners to understand how and why their behaviors and preferences have changed as a result of the economic crisis.

Solution Spotlight Mobile

Discover how to profit from mobile going mainstream for both consumers and businesses.

Solution Spotlight Consumer Connected Strategy

Learn about Digital Insight's strategy to connect services for your consumers - making them more loyal to you for their financial needs.

Solution Spotlight Business Financial Solutions

Gain the competitive edge with integrated accounting and online banking. Learn what's now and what's next.



Partner Workshop

Generate New Revenue through Person-to-Person (P2P) Payments

Payments between individuals are approximately 35 billion transactions per year, and growing. How can this potential new source of fee revenue replace interest income you may have lost? Attend this workshop to understand how P2P payment solution POPmoney can help you generate fee income and deepen customer loyalty by enhancing your online and mobile banking investments.

Session highlights include:

P2P market trends and industry data to demonstrate the strong and growing business case for P2P payments

Results of CashEdge's fourth annual survey of online banking consumers

Key success factors for implementation including integration and deployment requirements and options

A live, interactive demo of POPmoney

Marketing and promotional best practices, including specific information on how Digital Insight and CashEdge can help institutions promote POPmoney to their consumers

Presented by Neil Platt, SVP and General Manager, US Banking, CashEdge

1:45 pm - 2:15 pm

Break - Game prize awarded in Solutions Showcase

Grand prize sponsored by:



2:15 pm - 3:15 pm

Round Seven: Instant Focus Group and Solution Spotlights

Consumer - Understanding the "hidden" business owner

Talk to this panel of consumers that are also businesses to understand why mixing their personal and business accounts is just one example of their beliefs and behaviors.

Solution Spotlight Security - Business Focus

Understand current and emerging security threats and what you can do to stay protected.

Solution Spotlight Web Center

Acquire best practices for Web site design, development, management and optimization that drive adoption and active use.

Solution Spotlight

FinanceWorks +

LaunchSmart

FinanceWorks end users are up to 4x more profitable.

Learn how to mine them for growth within online financial management.

3:15 pm

Conference Adjourns

