CX CUSTOMER EXPERIENCE AUTOMATION

PERSON PERSON PERSON PERSON PERSON PERSON PERSON

DELIVER SUPERIOR CUSTOMER EXPERIENCE THROUGH CUTTING EDGE AUTOMATION

Sponsors: AUTOMATION ANYWHERE Go be great. | Chatbase | IBM Watson | servicenow | ttec

CUSTOMER EXPERIENCE AUTOMATION

Artificial intelligence and automation have been around for decades, but the sophistication of the technology continues to reach higher capability levels quickly.

Automation is expected to seamlessly handle the monotonous, mindless work of employees, not replacing jobs, but changing the scope and value of work as roles are augmented. Successful integration of automation can therefore result in faster and more accurate service, increased brand trust and loyalty, higher profits, and creative employees who have more time to deliver greater value to an organization.

Leading companies recognize the importance of seamless automation deployment for competitive advantage. Rather than leaving the responsibility in the hands of the data scientist or business improvement managers, CX professionals have an ideal opportunity to learn what it takes to offer the best in class automation tools for the ultimate customer experience.

CX Automation 2018 will showcase how customer experience and customer contact leaders are leveraging automation across their organization as a business strategy for planning, launching and further development within the end-to-end customer experience. Targeted breakout sessions will provide benchmarking opportunities in your specific organizational function as well as your organization's level of cutting edge automation adoption. Local site tours provide you with an opportunity to witness automation in practice.

The Customer Experience Automation Team

Automation Anywhere
Website: www.automationanywhere.com

Automation Anywhere is the global leader in delivering the most advanced, enterprise-grade, cognitive Robotic Process Automation (RPA) platform capable of automating any business process. The platform enables enterprises throughout the world to create digital workforces that manage and scale business processes faster, with near-zero error rates, while dramatically reducing operational costs. We believe that people who have more time to create, think, and discover build great companies. It's why we've dedicated more than a decade to providing the world's best RPA technology to leading financial services, BPO, healthcare, technology, and insurance companies—to name a few—across more than 90 countries.

Chatbase
Website: https://chatbase.com

Chatbase is a cloud service for analyzing and optimizing conversational interfaces. It gives builders sophisticated tools for creating better, and stickier, consumer experiences than ever before--leading to better conversion rates and retention. Chatbase uniquely relies on Google's machine learning capabilities to automatically uncover problems and opportunities that would otherwise take a lot of time, leading to faster optimizations and better accuracy. Chatbase easily integrates with any bot platform and type, voice or text, and is free to use.

IBM
Website: www.ibm.com/watson

IBM Watson is the AI platform for business. Watson understands structured and unstructured data, learns from collaboration and interacts with humans in a natural way. Watson is available as a set of APIs and cloud-based offerings including a cognitive, conversational bot that can both provide answers and take action. Through a new global partnership between IBM and LivePerson, we have launched a joint offering, LiveEngage with Watson, to provide Cognitive Care - the next evolution of customer care. LiveEngage is the complete platform for messaging, built for brands with tens of thousands of agents, tens of millions of consumers. Cognitive Care is driven by the legacy pain points of consumers, the rise of messaging as a preferred interaction type and the fact that Artificial Intelligence has come to forefront to solve major problems. LiveEngage with Watson seamlessly blends AI bots and live agents to dramatically scale your customer support operations. With this solution, your customers are able to get the answers they need any time, anywhere from Watson or to be passed to an agent as required - all within a single, consistent experience.

nVisium
Website: www.nvisium.com

nVisium is a privately held application security company based in Herndon, Virginia. nVisium has been identifying security issues, privacy problems, and compliance gaps in custom applications since 2009. We have since grown to provide Fortune 500 companies and household brands with application and cloud security solutions that resolve vulnerabilities before they can harm an enterprise or its users.

ServiceNow
Website: www.servicenow.com/csm

Your customers and partners demand fast and effective service, but disconnected systems and processes hold your customer service teams back. With the ServiceNow System of ActionTM you can replace these disconnected work patterns of the past with intelligent workflows of the future. As part of the System of Action, ServiceNow Customer Service Management allows your teams to focus on improving customer satisfaction while reducing costs. Now, you can deliver an effortless customer and agent experience, connect teams to fix issues, and proactively prevent calls. Learn more about ServiceNow in Customer Service Management at www.servicenow.com/csm

TTEC
Website: www.ttec.com

TTEC (NASDAQ: TTEC) is a global customer experience company that designs, builds and operates captivating omnichannel customer experiences on behalf of the world's most innovative brands. The Company provides its outcome-based customer engagement solutions through TTEC Digital which designs and builds customer experience consulting and technology solutions and TTEC Engage which operates customer care, growth and trust and safety services. Founded in 1982, TTEC partners with business leadership across marketing, sales and customer care to design and deliver a simple, more human customer experience across every interaction channel. The Company's 49,500 employees operate on six continents across the globe and live by a set of customer-focused values that guide relationships with clients, their customers, and each other. To learn more about how TTEC is bringing humanity to the customer experience, visit www.ttec.com.

INTERESTED IN BECOMING AN EVENT PARTNER?

There are limited solution provider opportunities available. Contact us today to discuss the value.

Max Ribitzky, Head of Commercial Research, Customer Experience Automation

spex@iqpc.com • **212-885-2727**

ADVISORY BOARD

Reflecting the diversity of the agenda, we are thankful for the support of our advisory board. The board is integral to the development and execution of Customer Experience Automation, supporting the strategic positioning of the brand and advising as to the content and participants that matter most.

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Executive VP Global Sales
Smart Action

Paul Bartley

SVP Shared Services
BD

John Pompei

Head of Customer Care Operations
Electronic Arts (EA)

Karen Ragusa

President
KLR Consulting

MEET YOUR CX LEADERS

Tim Bailer
VP Customer Experience
GoPuff

Paul Bartley
SVP Shared Services
BD

Celika Caldwell
VP Customer Experience Design
AARP

Samuel Carrington
Help Manager
Lyft

Richie Daigle
Group Director Automation &
Analytics
Coca Cola

Ryan Davis
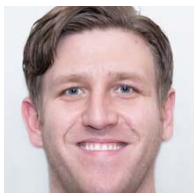SVP Procurement Management
Bank of America

Hernan Giraldo
Vice President of Customer
Experience Operations
Bark & Co.

Marvin L. Hamilton
Vice President, People
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Carola Mariscal
Strategic Transformation & RPA
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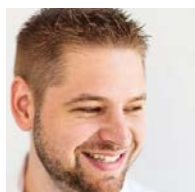**PepsiCo**

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CEO
nVisium

Dr. Joel Mier
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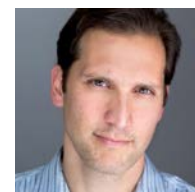**Formerly with Netflix**

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Global Head of Customer Success
and Support
**Baker Huges, a GE
Company**

Joanna Peña-Bickley
Head of Strategic Design &
Internet of Things
Amazon

Justin Reilly
Head of Customer Experience
Innovation
Verizon Fios

Ofer Ronen
General Manager at Chatbase
Google

MEET YOUR CX LEADERS

Nuray Gurtekin Sen
Head of Global Process & Quality,
Digitalization & Automation
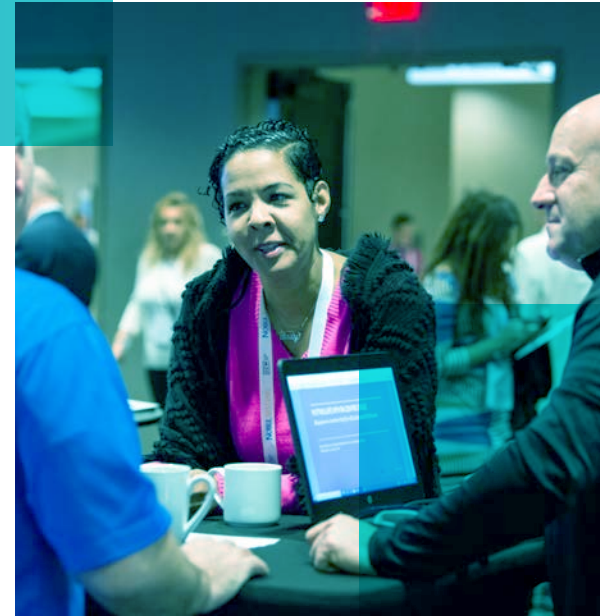**Siemens**

Bernard Slowey
Head of Worldwide Windows
Consumer Support
Microsoft

Kevin Thompson
CMO
**Sotheby's
International Realty**

Erin Van Remortel
Customer Experience
Strategist
**Verizon Enterprise
Solutions**

AGENDA-AT-A-GLANCE

DAY 1: PRE-CONFERENCE WORKSHOPS

8:30am	Check-In and Coffee
9:00am-11:00am	WORKSHOP A: Automation Bootcamp

11:30am-1:30pm	WORKSHOP B: Extract VOC from your Customer Contact: Using AI to Put Quality Back into the Customer Experience *(Working Lunch)*
2:00pm-3:00pm	WORKSHOP C: ServiceNow

DAY 2: MAIN CONFERENCE

7:45am	Check-In and Breakfast
8:30am	Chair Opening Remarks
8:40am	MORNING KEYNOTE: Automation - Embracing the Inevitable and Preparing for Change
9:00am	THE ROI OF AUTOMATION: Why Speed Defines your Customer Service Experience
9:30am	SYNERGYSTIC SOLUTIONS: Machine Learning and Intelligent Process Automation
10:00am	Networking Break & AI Drive
11:00am	MATURITY ROUNDTABLES: Building the Automation Business Case
12:00pm	Networking Lunch
1:00pm	AUTOMATION ROADMAP: Master Each Step of Successful Automation Strategy and Execution

- 1:05pm Evaluate
- 1:30pm Target
- 1:55pm Design
- 2:20pm Develop

2:45pm	Afternoon Networking Break
3:15pm	AUTOMATION ROADMAP: Master Each Step of Successful Automation Strategy and Execution (Cont.)

- 3:15pm Choose
- 3:40pm Pilot
- 4:05pm Rollout
- 4:30pm Post Implementation

4:35pm	CYBER RISK: Managing the Security Risks of an Automation Plan
5:10pm	CASE KEYNOTE: Ensure Oversight of Robotic Process Automation through Analytics
5:40pm	Closing Remarks
5:45pm	Networking Cocktail Reception

DAY 3: MAIN CONFERENCE & SITE TOUR

8:00am	Check-In and Breakfast
8:15am	Chair Opening Remarks
8:30am	OPENING KEYNOTE: Leveraging AI for 360 CX Improvement
9:15am	INDUSTRY POWER HOUR Automation Short Stories
10:30am	Networking Break
11:00am	CASE KEYNOTE Exploring the Benefits of Better Bots

11:30pm	The Secret to SCALING AUTOMATION
12:00pm	Networking Lunch
1:10pm	Bus to Google HQ
1:30pm	SITE TOUR: Google Mountain View HQ
3:30pm	Return to Hotel
3:50pm	Conference Concludes

DAY 1: PRE-CONFERENCE WORKSHOPS
Wednesday, September 5

8:30am **Check-In and Coffee**

9:00am - **WORKSHOP A: Automation Bootcamp**
11:00am

Hosted by: **TTEC**

This introduction to Automation provides a crash course on all you need to know to incorporate automation as a fundamental component of your CX strategy:

- Where should you begin your intelligent automation journey? How can you prepare for the next steps in this journey and ensure you build this path in a sustainable and consistent manner?
- How can your organization get started with AI, Machine Learning, and/or RPA?
- What strategy and plans does your organization need to be ready for AI and Automation?
- Gain a basic understanding of the four main generations of bots that companies are implementing, their characteristics and associated benefits.
- How to automate the customer experience in three distinct areas: email interactions, content marketing across your website and social media channels, and customer support

11:30am - **WORKSHOP B: Extract VOC from your Customer Contact: Using AI**
1:30pm **to Put Quality Back into the Customer Experience (Working Lunch)**

Hosted by: **IBM Watson**

IBM **Watson**

In this workshop, you will learn how to combine people + machine learning to extract relatable data from customer interactions and transform it into usable, performance-enhancing coaching recommendations and customer experience intelligence.

- Analyze conversations in real time, and provide leadership with actionable, searchable insights based on VOC
- Identify clear next steps to infusing AI+HI into your operations
- Find patterns in your data and automate descriptive, predictive and prescriptive analytical tasks

2:00pm - **WORKSHOP C: ServiceNow**
4:00pm

servicenow

DAY 2: MAIN CONFERENCE

7:45am   **Check-In and Breakfast**

8:30am   **Chair Opening Remarks**

8:40am   **MORNING KEYNOTE ADDRESS:** Automation: Embracing the Inevitable and Preparing for Change

> **Ryan Davis**
> SVP Procurement Management
> **Bank of America**

Many fear it. Others embrace it. While many ideas and theories circulate about how automation can make a positive or negative impact in a variety of ways, the fact remains that the use of automation is expected to rise dramatically by 2020. Sophisticated technologies are here to stay.

This keynote will weigh the pros, cons and solutions associated with automation, exploring:

- Will AI eliminate jobs or simply shift the focus of our work?
- What will the new workplace look like?
- Do the benefits of enhancing the customer experience outweigh possible negative consequences?

9:00am   **THE ROI OF AUTOMATION:** Why Speed Defines your Customer Service Experience

> **Paul Bartley**
> SVP Shared Services
> **BD**

Automation tools can result in low costs, high levels of customer satisfaction, and unique differentiation for your company if implemented intelligently. This session will take you on a journey through the specific ways BD has achieved ROI including:

- AI, Chatbots and Virtual Assistants— blending automation technologies across channels to orchestrate differentiated customer experiences
- How to make automation work for your customers and contact center: build agile customer journeys, reduce call volumes and increase First Call Resolution (FCR)

9:30am   **SYNERGYSTIC SOLUTIONS:** Machine Learning and Intelligent Process Automation

> **Hernán Giraldo**
> VP of Customer Experience Operations
> **Bark & Co.**

> **Justin Reilly**
> Head of Customer Experience Innovation
> **Verizon-Fios**

When planning to implement an automation strategy, it's important to bear in mind it must be executed correctly to get funded and continue to receive company resources.

Intelligent Automation is about creating synergies between RPA, cognitive, IoT, chatbots and AI for a proactive CX approach.

This keynote will share how to achieve said synergies and where to begin, addressing common questions such as:

- How are AI, chatbots, IoT, and RPA linked together? How can each complement one another?
- If we've already implemented some chatbots, do we really need RPA?
- Where does IoT come into play?

10:00am   **Networking Break & Automation Drive**

11:00am   **MATURITY ROUNDTABLES:** Building the Automation Business Case

These simultaneous roundtables generate a best practices dialogue around case studies of companies at various stages of automation transformation.

NEW TO AUTOMATION: Becoming the Advocate for Automation

> **Bernard Slowey**
> Head of Worldwide Windows Consumer Support
> **Microsoft**

Small wins in automation will help build the foundation and business case for continued investment. This roundtable discusses strategies to showcase automation wins at the project levelthrough low hanging fruit in order to advocate for larger organizational commitment to the process investment.

AUTOMATION VETERAN: Overcoming Organizational Buy-In and Implementation Challenges

> **Marvin L. Hamilton**
> Vice President, People
> **Condé Nast**

Once company leaders have bought into automation, other roadblocks can emerge across the organization. What strategies can you leverage to enhance buy-in and overcome implementation challenges on the ground?

AUTOMATION-LED COMPANY: Sustaining and Continuously Improving Automation

> **Nuray Gurtekin Sen**
> Head of Global Process & Quality, Digitalization & Automation
> **Siemens**

Your company has rolled out automation across the organization. How will you continuously improve processes? How will you avoid the pitfalls that come with automation at scale?

12:00pm   **Networking Lunch**

1:00pm   **AUTOMATION ROADMAP:** Master Each Step of Successful Automation Strategy and Execution

Attendees will experience a series of quickfire automation step presentations for 25 minutes each. Participants address their unique challenges and walk away armed with solutions for each step.

There is no better way to sharpen automation acument than through exchanging ideas with peers, both fledgling and veteran. Advanced practitioners benefit by benchmarking across companies and refining existing skills.

1:05pm   **EVALUATE**

Evaluate your business process to maximize the potential for automation. What can be automated and when?

Joanna Peña-Bickley
Head of Strategic Design & Internet of Things
Amazon

1:30pm   **TARGET**

Target process identification by determining if your processes are adaptable for automation.

Marvin L. Hamilton
Vice President, People
Condé Nast

1:55pm   **DESIGN**

Redesign process flows to maximize scope for automation. Automation plans should be designed keeping the business structure in mind and customized as per the process needs.

2:20pm   **DEVELOP**

This is the time to develop your automation plan. Analyze your processes to identify which parts don't need automating, need automating urgently, will take time or be quick to automate.

2:45pm   **Afternoon Networking Break**

3:15pm   **AUTOMATION ROADMAP:** Master Each Step of Successful Automation Strategy and Execution (cont.)

3:15pm   **CHOOSE**

Learn how to source which solution provider or providers is best for your unique needs.

Erin Van Remortel
Customer Experience Strategist
Verizon Enterprise Solutions

3:40pm   **PILOT**

Testing your plan allows you to analyze its efficiency, effectiveness and performance.

Samuel Carrington
Help Manager
Lyft

4:05pm   **ROLLOUT**

Once your automation plan has been implemented, build contingency plans where a team of chosen executives keeps a watchful eye on lingering risks.

4:30pm   **POST IMPLEMENTATION**

Whether outsourced to a solution provider or managed in house, delegate a party responsible for managing the process, end-to-end with 24x7 support.

4:35pm

CYBER RISK: Managing the Security Risks of an Automation Plan

Cyber threats are an intense reality and the ability to safeguard your customers' information and instilling trust adds a huge boost to the customer experience. Learn about critical attributes when selecting your cyber risk solution provider.

Hosted by: **nVisium**

Jack Mannino
CEO
nVisium

5:10pm

CASE KEYNOTE: Ensure Oversight of Robotic Process Automation through Analytics

Carola Mariscal
Strategic Transformation and RPA leader
PepsiCo

As the hype around RPA continues, ensuring there is adequate automation oversigh tinventory becomes increasingly critical for sustainable efficiency. Oversight allows for re-usability, efficient maintainability, root cause analysis and insights for further opportunities for AI:

- Will AI eliminate jobs or simply shift the focus of our work?
- Overseeing the RPA program to ensure that it is aligned to your strategy and delivers improved CX (internal, external and employee)
- Governing and efficiently managing automation through analytics
- Sharing the RPA "oversight" to gain sponsorship, re-use automations and improve employee engagement
- Utilize robotics logs and audits as a tool to provide insights and actionable feedback

5:40pm **Closing Remarks**

5:45pm **Networking Cocktail Reception**

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12

CX CUSTOMER EXPERIENCE AUTOMATION

8:00am   Check-In and Breakfast

8:15am   Chair Opening Remarks

8:30am   OPENING KEYNOTE: Leveraging AI for 360 CX Improvement

Joanna Peña-Bickley
Head of Design, Internet of Things
Amazon

Artificial Intelligence and Machine Learning technologies will continue to take center stage in our future and play a critical role in the decisions companies make on nearly everything—particularly when it comes to creating an unparalleled customer experience.

Learn how AI is evolving to enable self-service predictive reports and dashboards to surface tangible insights with benefits that range from CX strategies to agent productivity recommendations to visualized direction.

Join this session to learn best practices for extending your competitive advantage.

- Leverage emerging technology to enhance customer experience
- Identify trends in data and make predictions on customer expectations
- Significantly shave off time spent on tasks that prove to be pain points for customers
- Cut costs and increase profits by working smarter

9:15am   INDUSTRY POWER HOUR: Automation Short Stories

Hear from CX leaders across various industries share their automation at their respective organizations, how they got started and how it has transformed their customer experience. Each expert will leave you with their top two pieces of inspirational yet practical advice for organizations already embracing or looking to implement automation.

9:15am   Energy

Ray Mitra
Global Head of Customer Success and Support
Baker Hughes, a GE company

9:40am   Real Estate

Kevin Thompson
Chief Marketing Officer
Sotheby's International Realty

10:05am   Healthcare

Celika Caldwell
Vice President, Customer Experience Design
AARP

10:30am   Networking Break

11:00pm   CASE KEYNOTE: Exploring the Benefits of Better Bots

Erin Van Remortel
Customer Experience Strategist
Verizon Enterprise Solutions

While customer service centers put chatbots in place years ago to free up agents for customer inquiries, the argument if there was a better strategy. Waiting on hold when dialing in, receiving a series of automated responses that don't meet our needs, waiting in the queue—these are all extreme pain points on the customer journey. With today's advancements in technology, a variety of companies can now resuscitate their customer service by deploying more intelligent bots.

This sessions discusses the latest in bot technology and their newfound benefits.:

- Engage customers and initiate private conversations
- Free hours of time for more meaningful customer interactions
- Help retain top customers and regain customers
- Book appointments and track human footfall detection

11:30am The Secret to **SCALING AUTOMATION**

Richie Daigle
Group Director, Automation & Analytics
Coca Cola

Tim Bailor
VP Customer Experience
Insomnia Cookies

Paving the way for automation adoption alone on particular projects can prove challenging, but add the complexity of scaling automation and you could be in for a a not-so-real-treat. However, the benefits of automation at scale include gaining serious competitive advantage if done right.

Hear from a panel of professionals as they share how they successfully scaled automation and overcome associated challenges as they address:

- How to build the right foundation for successful automation at scale?
- Where does change begin?
- How automation at scale transforms the customer experience
- What inhibits companies back from scaling automation?
- How can you gain buy-in from the right people?
- The efficacy of new technology, robotic service orchestration (RSO), specifically designed to address the challenges of automation at scale

12:00pm **NETWORKING LUNCH**

1:10pm **Bus to Google HQ**

1:30pm **SITE TOUR:** Google Mountain View HQ

Next Generation Virtual Agents: Leveraging a Data Driven Approach to Optimize Contact Center Interactions
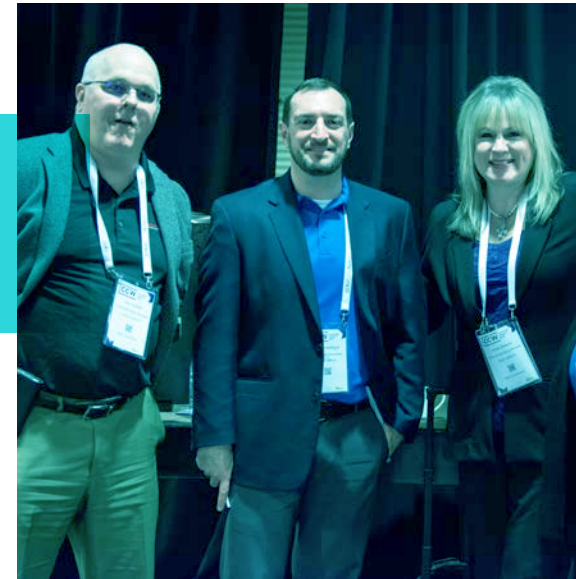
Ensuring quality handling of contact center interactions is key. Virtual agents provide a forward-thinking, automated method for providing 24x7 support to customers on the channel of their choice. By using machine learning optimizations, virtual agents can be made smarter, providing quick and efficient support to customers. Chatbase is a cloud-based analytics service for builders of conversational interfaces, or chatbots. It helps those builders more easily analyze and optimize their bots for better consumer experiences than ever before. During this session at Google's Mountain View headquarters, the Chatbase team will showcase what it takes to leverage a data-driven approach for virtual agents for customer success.

Ofer Ronen
General Manager at Chatbase
Google

3:30pm **Return to Hotel**

3:50pm **Conference Concludes**

SITE TOUR

Google - Mountain View HQ Site Tour
September 7, 2018
2:15PM

Next Generation Virtual Agents: Leveraging a Data Driven Approach to Optimize Contact Center Interactions

Ensuring quality handling of contact center interactions is key. Virtual agents provide a forward-thinking, automated method for providing 24x7 support to customers on the channel of their choice. By using machine learning optimizations, virtual agents can be made smarter, providing quick and efficient support to customers. Chatbase is a cloud-based analytics service for builders of conversational interfaces, or chatbots. It helps those builders more easily analyze and optimize their bots for better consumer experiences than ever before. During this session at Google's Mountain View headquarters, the Chatbase team will showcase what it takes to leverage a data-driven approach for virtual agents for customer success.

Meet Our Host

Ofer Ronen
General Manager
at Chatbase
Google

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The special room rate of $199 has been established to make your reservation process easy. Simply call 408-942-0400 and give the group name IQPC. **You must make your reservation no later than August 14th, 2018**. For your convenience, the special rate has been extended to three days before and after the conference.

Please note: IQPC will never recommend, approve or appoint any third party rooming service to act on our behalf. Please be extremely wary if you are approached by any such companies. We will always endeavour to negotiate the best available rates for you so please use the Hotel's website link provided.

THINGS TO DO

Whether you're extending your business trip or squeezing in some after hours entertainment, the San Jose surroundings boasts plenty of fun and unique activities to suit a variety of penchants.

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PACKAGE DESCRIPTION	
2 Day Pass (9/6-9/7)	Main Conference + Friday Site Tour
3 Day Pass (9/5-9/7)	Wednesday Workshops + Main Conference + Friday Site Tour

A LA CARTE OPTIONS	
Workshops	$549 each

TEAM DISCOUNTS - PACKAGES ONLY (END-USERS ONLY)	
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