

The 5th annual

Middle Market Summit

June 19-20, 2018 // The Westin, Chicago, IL

Middle market companies are continuing to thrive. What are you doing to support them?

According to a recent survey from the National Center for the Middle Market, more than 70 percent of middle market companies reported improved year-over-year company performance. *

CPI is providing an expanded Middle Market Summit program this year, reflecting the growing opportunities to better serve this varied market segment.

Opportunities abound to provide cards and payments services that help these companies continue to thrive. Eliminating time consuming manual processes, addressing their cashflow needs, and transitioning them into the digital age are just some of the ways financial services can help with improving performance.

New to the program

- // **FinTech showcase:** Quickfire demonstrations from new tech providers reveal how commercial payments FinTechs are making an impact
- // **Roundtable discussions:** Tap into the expertise of your peers

* Q4 2017 Middle Market Indicator (MMI) conducted by the National Center for the Middle Market (NCMM)

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Fresh discussion topics include:

// Translating consumer digital experiences into business digital experiences

How can banks leverage the successes they've had on the consumer side to create better experiences for their business customers?

// Understanding the vast universe of FinTechs

There are more FinTechs than you can keep track of. Understand how to differentiate their services and determine who to partner with; as well as identify your greatest competitor

// How to best meet customer needs

While it may seem a no-brainer, not everyone does it. What are buyer and supplier pain points and how do you alleviate them? And middle market companies vary vastly when it comes to their organizational structures.

The venue

The Westin

909 North Michigan Avenue, Chicago, IL, 60611, US
Visit the [website](#) for preferential rates.

For preferential rates, book before May 10, 2018.

Who will you meet?

An audience of over 100 senior-level industry delegates is expected to represent over 50 leading organizations. Middle market specialists from multinational and large regional banks as well as heads of middle market banking from local banks are expected to attend. Financial institutions of all types, consultants and key suppliers will also be present.

Past attendees include:

- American Express
- Fifth Third Bank
- Regions Bank
- AOC Solutions
- First Annapolis (part of Accenture)
- RFi Group
- Association of Corporate Travel Executives
- First Data
- Royal Bank of Canada
- AvidXchange
- First Interstate Bank
- Sidley Austin
- BakerHostetler
- First National Bank
- Silicon Valley Bank
- Bank of Montreal
- FIS
- Spend Labs
- Bank of the West
- Fraedom
- Store Financial
- BB&T
- Grant Thornton LLP
- TAS Group
- BBVA Compass
- Inlogik
- TD Bank
- Billtrust
- The Boston Consulting Group
- Itemize
- BMO Financial Group
- Ixaris
- The Economist Intelligence Unit
- Boost Payment Solutions
- J.P. Morgan
- Travel and Transport Inc.
- Bottomline Technologies
- KDS
- Treasury Alliance Group LLC
- Capital One
- M&T Bank
- Troutman Sanders LLP
- Citizens Financial Group
- MasterCard
- TSYS
- City National Bank
- MB Financial Bank
- Comdata
- Middle-Market Executive LLC
- UATP
- Commercial Payments International
- MidFirst Bank
- UMB Bank
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- Diners Club International
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- Endava
- National Center for the Middle Market
- Vantiv
- Nvoicepay
- Visa
- Paytech
- Wells Fargo
- PNC Bank
- Zions Bancorporation

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DAY 1

// TUESDAY JUNE 19, 2018

1:00 REGISTRATION AND NETWORKING

2:00 WELCOME

Melissa Sefic, SVP, Head of Commercial Payments International, EuroFinance
Frank Martien, MD, Accenture

2:05 THE DIGITAL REVOLUTION IN B2B PAYMENTS: ARE YOU READY TO PLAY BY THE NEW RULES?

Today's middle market business leaders are also consumers, accustomed to making transactions via mobile devices with the swipe of a finger. With expectations rising among customers, what are commercial payments providers doing to create user-friendly platforms and enhance the customer experience, especially in areas such as travel and expense management. How are these being integrated into the varied tools and systems that are currently being used by the middle market customer? And what role do APIs play as banks work to build better platforms through partnerships?

Bradley Matthews, SVP, Head of Middle Market Product & Marketing, U.S. Bank

2:45 FINANCIAL FLUENCY

Much is expected of today's sales teams. Not only do they need to know about the core set of products, but also learn how to talk to both buyers and suppliers, understand the treasury function, the specific needs of various middle market companies, and their organizational structures. What systems do the clients possess and how do commercial product offerings fit into them? This session will address what skill sets to focus on, the kinds of conversations sales teams should be having with clients, and the benchmarks (as related above) to work toward.

Kareem Chouli, VP of Sales, Americas & EMEA, Freedom
Jim Goge, SVP, Sales, MSTs
Greg Pastorek, Director, Commercial Partnerships, North America, Mastercard

3:30 NETWORKING REFRESHMENT BREAK

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4:00 ROUNDTABLE DISCUSSIONS

Attendees will have an opportunity to exchange insights, ideas and best practices with peers in commercial payments during roundtable discussions. Moderators will lead roundtables that focus on a variety of topics. At the end of the session, roundtable leaders will summarize key learnings from their roundtables and how to address the issues in the months following the summit. Topics include:

- Integrated payables
- FinTech partnerships
- Supplier enablement
- T&E automation
- Faster/real-time payments
- New rules and regulations
- Mid-market industry verticals
- The digital experience

Shona Sabah, Senior Consultant, KAE
Melissa Moss, Product Development Manager, TSYS
Reza Satongar, CEO, Dataflexnet
Leigh Radtke, Senior Director, Commercial Product, Middle Market Lead, Visa
Stephen Williams, VP, Marketing, MineralTree
Frank Martien, Managing Director, Payments, Accenture
Dan Close, Senior Director, Business Development, SAP/Concur
Simon Lyons, Commercial Banking Partner, Conferma

5:00 WELCOME NETWORKING RECEPTION

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For program and speaker updates, visit

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DAY 2

// WEDNESDAY JUNE 20, 2018

8:00 REGISTRATION AND NETWORKING BREAKFAST

Breakfast sponsored by

SAP Concur 

9:00 WELCOME AND OPENING REMARKS

Melissa Sefic, SVP, Head of Commercial Payments International, EuroFinance
Frank Martien, MD, Accenture

9:10 A MANAGED APPROACH TO INTEGRATED PAYABLES

Clients have more choices available to them than ever before – cards, ACH and faster and real-time payments. But is it a matter of one product vs. another or rather an approach that address the various requirements of the client? What is the value proposition of each within an integrated payables approach, and how does the bank approach this?

Andrew Stewart, Product Manager, U.S. Commercial Card, Bank of America Merrill Lynch
Arthur Weiner, Head of Commercial Card, MD, Fifth Third
Justin Walters, Director, Commercial Product Sales & New Payment Flows, Mastercard

10:00 A GUIDE TO TODAY'S FINTECHS

Today's FinTech providers are touching on nearly all aspects of financial services, having made significant impacts in retail and consumer payments and looking to do the same in the B2B sector. But how do you make sense of them all, or even begin to keep track? Here is a survey of the categories of B2B FinTechs, as well as criteria that you should be using when selecting partners.

Ben Alderman, Senior Director, Commercial Partnerships & New Initiatives, Visa

10:30 NETWORKING REFRESHMENT BREAK

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11:00 B2B FINTECH SHOWCASE

Five back-to-back quick-fire presentations from commercial payments FinTechs demonstrate how they are collaborating with financial intuitions, solving problems for customers, and simplifying client processes.

Jørgen Christian Juul, CEO, Cardlay
Greg Thompson, Head of Financial Partner Development, Conferma
Thomas Tierney, Business Development, Extend
Ernest Rolfson, Founder & CEO, Finexio
Nasser Chanda, CEO, Paymerang

11:45 FINTECH SHOWCASE Q&A

12:00 LUNCH

1:00 ALLEVIATING SUPPLIER PAIN IS EVERYONE'S GAIN: WHERE THE VALUE OF COMMERCIAL CARDS MEETS SUPPLIER NEEDS

It seems an eternal challenge – how can providers best communicate the value of acceptance and where are they falling short? Getting over this hurdle can contribute to growth in core commercial products. Beyond the basics, what are the specific aspects of card acceptance that suppliers can take control of, like payment terms, that will help address their pain points?

Nicole Molleur, Program Manager, MineralTree
Stephen D. Cohen, SVP Business Development & Issuer Relations, Boost Payment Solutions, Inc.
Matt McCarthy, SVP, Priority Payments

1:45 REBATES, REWARDS AND INCENTIVE PROGRAMS

Rewards and incentives for corporates and employees alike have been in existence for years. But what have been the most successful programs issuers have created to provide value back to clients? Are programs designed particularly for the middle market segment that have been especially effective and what are some of the best-practice aspects of such programs that issuers can continue to adopt?

Melanie Epp, VP, Commercial BankCard, BB&T
Greg Fioriti, VP, FIS
Jordan Mitchell, Director, Commercial & Corporate Card Solutions, RBC

2:30 NETWORKING REFRESHMENT BREAK

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LOOKING AHEAD

3:00 NEW RULES AND (DE) REGULATION ROUNDUP

While the current government administration has made initial moves to loosen regulations put forth by its predecessor, other mandates are being rolled out, chief among them is the beneficial ownership rule. What aspects of new and revised rules and regulations should issuers and other payments providers pay special attention to, and how will they impact programs and projects planned in the coming year?

Stanley J. Boris, Associate, Sidley Austin LLP

3:45 MIDDLE MARKET OPPORTUNITIES AND ROADBLOCKS

What are the key trends that your teams need to be aware of and talking about? What opportunities are these trends driving in commercial cards and payments? Hear about some of the key opportunities and barriers facing the industry today, including what verticals are poised for growth.

Chris Holmes, SVP, KAE Consulting

4:15 NETWORKING RECEPTION

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CPI Middle Market Summit

June 19-20, 2018 // The Westin, Chicago, IL

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WEB

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Please note: Registration is subject to approval.

Note to suppliers: First preference is given to financial institutions, corporate and government end users, and commercial payments practitioners.

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