

Wednesday, June 03 – Networking Reception

5:45 PM – 9:00 PM	Welcome Reception and Dinner	Meet in hotel lobby for transportation to Penn Brewery . Enjoy an informal networking reception and dinner on us.
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Thursday, June 04 - Agenda

07:30 AM – 08:30 AM	Registration & Breakfast	Continental breakfast provided
08:30 AM – 08:45 AM	Conference Opening	Introduce Quest Analytics Team and review Agenda
08:45 AM – 09:30 AM	What's New & Roadmap	Sharing Quest Analytics' key 2019 software enhancements and the upcoming roadmap for 2020 and beyond.
09:30 AM – 09:45 AM	Break	
10:00 AM – 11:00 AM	Best Practices in CRM Adoption	Financial Institution (FI) panel discusses best practices for engaging CRM adoption within their unique environments.
11:00 AM – 12:00 PM	Retail Banking: Growth, Retention & Expansion	An FI panel will discuss how they have succeeded in using the IQ tools to support growth plans within their financial institutions.
12:00 PM – 01:00 PM	Food for Thought (Lunch)	Time to eat! Tables will have defined topics and conversation prompts related to Quest modules. Pick your table and connect with others.
01:00 PM – 02:15 PM	Improve It Workshop	Three 20-minute small group sessions focused on software improvement and enhancement ideas by module. Attendees will receive a list of existing enhancements and be able to provide their feedback and ideas for prioritizing new software features and functionality.
02:15 PM – 02:30 PM	Break	
02:30 PM – 03:30 PM	IQLeads - Sales / Service / Retention Leads for Success	FI panel will discuss the most successful leads used to date: the objective of the lead, the criteria used, and how this has impacted them. Quest encourages audience sharing of the same.
03:00 PM – 04:00 PM	Break Out #1: Teller Referral Techniques	Referrals are the lifeblood of any financial institution. A panel will discuss techniques for generating more qualified referrals.
	Break Out #2: IQService Deep Dive	Hear from a panel on how IQService is creating operational efficiencies in the contact center.
04:00 PM – 04:30 PM	Mobilizing Your Sales Team	Sales staff depend on information to help them grow relationships. Using mobile applications, they can be more efficient and effective in building relationships and managing their sales activities / updating their pipelines. An FI panel will discuss their usage of the IQProspects mobile applications for iPhone/iPad and Android devices.

Thursday, June 04 – Evening Outing

05:45 PM		Gather for provided transportation to PNC Park.
06:45 PM	Pittsburgh Pirate Game Networking Event	Fun evening of baseball and networking with your peers. Quest will have the “Skull Bar” section of the park. Dinner and drinks will be provided.
9:00 PM / ~ 10:00 PM	Pirates are playing St. Louis Cardinals	Transportation will be provided back to the hotel at 9:00 PM for anyone wishing to leave earlier. Transportation will be provided at the end of the game for everyone else.

Friday, June 05 – Agenda

07:30 – 08:30 AM	Networking Breakfast	Continental breakfast will be provided
08:30 – 09:30 AM	Best Practice in Training	Hear from FI trainers about what they’ve learned at their institutions. You will hear about some of the techniques they use for improving skills-based training programs.
09:30 – 10:30 AM	Reporting & Incentive Tracking	Reporting is a pivotal part of evaluating results and performance. Hear from financial institutions on how they use the reports for tracking and incentive management.
10:30 – 10:45 AM	Break	
10:45 – 11:45 AM	New Modules IQCollections & IQLobby	Demonstration and discussion about the newest modules in the CRM IQSuite. Client FI will discuss their usage of IQCollections & IQLobby.
11:45 – 12:00 PM	Conference Closing	Thank you for your participation at Quest’s 2020 User Conference!

Special Request: Please use the link below to register for your room(s). Accommodations made elsewhere (ex. Expedia) will not qualify for our hotel block which includes preferred pricing for the included meals. Though it won’t make a difference on your end, it will make a significant one for us. Thank you in advance for assisting us with this by only using the link below and provided elsewhere on our website to book your hotel room!

