



## 2017 SEAA Agenda March 19-22, 2017

**Le Meridien Charlotte    Charlotte, North Carolina**

### Sunday, March 19th

8:00 p.m. - 12:00 a.m.    SEAA Super 70's Party - *If you are arriving on Sunday, join us at CJ's in your best 70's attire (optional). Drinks will be hosted by SEAA from 8pm-9pm and cash bar after 9pm.*    CJ's

### Monday, March 20th

10:00 a.m.    Registration Open, sponsored by **Merchants Choice Payment Solutions**    Symphony Ballroom Foyer

10:00 a.m. - 4:00 p.m.    Exhibitor Set-Up    Symphony Ballroom I-IV

12:00 p.m. - 3:00 p.m.    ETAU Introduction to Sales and Marketing    Governor's Ballroom 4-6

3:00 p.m. - 5:00 p.m.    SEAA Innovation Competition, **TEST TRACK '17**    Carolina Ballroom A-C

5:00 p.m. - 6:30 p.m.    Opening Reception in Exhibit Hall, sponsored by **National Merchants Association**    Symphony Ballroom I-IV

8:00 p.m. - 12:00 a.m.    After Hours Party, sponsored by **WorldPay**    Fahrenheit-Charlotte, 222 S Caldwell St

### Tuesday March 21st

8:30 a.m.    Registration Open, sponsored by **Merchants Choice Payment Solutions**    Symphony Ballroom Foyer

9:00 a.m. - 10:00 a.m.    Continental Breakfast in the Exhibit Hall, sponsored by **Merchants Choice Payment Solutions**    Symphony Ballroom I-IV

9:00 a.m. - 10:45 a.m.    Exhibit Hall Open    Symphony Ballroom I-IV  
*Exhibitors may access the Hall at 8:30 a.m. to refresh displays, Continental Breakfast will be available for the Exhibitors.*

10:00 a.m. - 10:50 a.m.    **Breakout Session 1**  
**Breakout 1(a):** CNP Chargeback Management, What Acquirers Should Expect from Their Merchants; Benjamin Grossman, Pinpoint Intelligence    Governor's Ballroom 1 & 2  
**Breakout 1(b):** Running a Business 101, Running Your ISO Like a Pro; Garima Shah, Direct Connect    Governor's Ballroom 3 & 4  
**Breakout 1(c):** Plan, Track and Adjust to Maximize a Portfolio's Value; panel led by James Huber, Global Legal Law Firm    Governor's Ballroom 5 & 6

11:00 a.m. - 11:45 a.m.    Opening Remarks & PAYCLT Panel    Carolina Ballroom

12:00 p.m. - 1:00 p.m.    Lunch, sponsored by **American Express**    Mecklenburg Ballroom & Foyer

1:00 p.m. - 1:45 p.m.    Keynote Speaker, Matt Clark, sponsored by **Allegiance Merchant Services**    Carolina Ballroom

1:45 p.m. - 2:30 p.m.    Adapting to Change and Capitalizing on the Future of Payments, Greg Cohen    Carolina Ballroom

2:30 p.m. - 4:30 p.m.    Exhibit Hall Open    Symphony Ballroom I-IV

2:30 p.m. - 3:20 p.m.    **Breakout Session 2**  
**Breakout 2(a):** From Payments to POS: Things to Know as You Go; panel led by Kelly Funk, RSPA    Governor's Ballroom 1 & 2  
**Breakout 2(b):** Residual Reporting: The Good, The Bad    Governor's Ballroom 3 & 4

and The Ugly; panel led by Mark Dunn, Residual Sheriff

3:30 p.m. - 4:20 p.m.	<b>Breakout 2(c):</b> Value Beyond Processing: New Revenue Streams from Non-Transaction Related Products; panel led by Sonny Wooten, National Benefit Programs <b>Breakout Session 3</b>	Governor's Ballroom 5 & 6
	<b>Breakout 3(a):</b> PCI Clarity, Your Path to Great Customer Engagement & Organic Growth; Giles Witherspoon-Boyd, Protocol PCI	Governor's Ballroom 1 & 2
	<b>Breakout 3(b):</b> American Express, A Trusted Brand and Valuable Partner; Allison Keane, American Express	Governor's Ballroom 3 & 4
	<b>Breakout 3(c):</b> Recent Changes in Working Capital Landscape and How ISOs Can Take Advantage; Andrew Altschuler, Strategic Funding Source	Governor's Ballroom 5 & 6
4:30 p.m. - 5:30 p.m.	Happy Hour	CJ's
5:30 p.m. - 7:00 p.m.	Closing Reception in Exhibit Hall, sponsored by <b>Ezic</b>	Symphony Ballroom I-IV

### **Wednesday, March 22nd**

6:30 a.m. - 9:30 a.m.	Breakfast at your leisure, sponsored by <b>Apriva</b>	Evoke at Le Meridien and Social Bar & Kitchen at Sheraton
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***For more information on Breakout Session Topics, please see the Summaries beginning on the next page***

# SEAA 2017 Breakout Sessions

Breakout Session 1, 10:00 – 10:50 a.m.:

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- **CNP Chargeback Management, What Acquirers Should Expect From Their Merchants, Governors Ballroom 1 & 2**  
*Benjamin Grossman, Pinpoint Intelligence,*  
CNP is increasing for all acquirers; ISOs and Acquirers are taking on the risk and responsibility for their merchants. Chargeback Management is key to decrease your culpability.
- **Your ISO is Your Business, Run It Like a Pro, Governors Ballroom 3 & 4**  
*Garima Shah, Direct Connect,*  
Discuss the business fundamentals pertinent to ISOs, including when to make us of productive debt, get your partners working for you, planning and entity structure and other topics key to the successful entrepreneur.
- **Plan, Track and Adjust to Maximize a Portfolio's Valuation, Governors Ballroom 5 & 6**  
*panel led by James Huber, Global Legal Law Firm,*  
A panel of industry experts discussing how to build and sell a merchant portfolio to maximize income to the ISO/Agent, from creating value in your portfolio to sourcing a buyer, negotiating the deal and managing the fallout.

Breakout Session 2, 2:30 – 3:20 p.m.:

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- **From Payments to POS, Things to Know as You Go, Governors Ballroom 1 & 2**  
*panel led by Kelly Funk, RSPA,*  
The lines between payments and point of sale continue to blur. Come learn from a panel of individuals who are talking payments and POS daily. They'll share why this is a great area of opportunity for you, current requirements that you may not be aware of and share several resources to help you along this journey.
- **Residual Reporting: The Good, The Bad and The Ugly, Governors Ballrooms 3 & 4**  
*panel led by Mark Dunn, Residual Sheriff,*  
Procedures, formats and standards for Best Practices in residual reporting will be presented, and Panelists will discuss how this can improve the industry, whether they can be implemented and any potential problems or issues.
- **Value Beyond Processing: New Revenue Streams from Non-Transaction Related Products, Governors Ballroom 5 & 6**  
*panel led by Sonny Wooten, National Benefit Programs,*  
How to become indispensable to your merchants and generate new revenue streams from non-transaction related products/services; panel includes National Benefit Programs, Strategic Funding Source, Klosebuy and Womply.

Breakout Session 3, 3:30 – 4:20 p.m.

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- **PCI Clarity is your Path to Great Customer Engagement & Organic Growth, Governors Ballroom 1 & 2**  
*Giles Witherspoon-Boyd, Protocol PCI,*  
Currently, the bad guys are winning, due in part to the mixed narratives on PCI out in the market place. It is time to clarify our messages, educate the merchant and build a solid revenue stream in the process.

- **American Express, A Trusted Brand and Valuable Partner, Governors Ballroom 3 & 4**  
*Allison Keane, American Express,*  
American Express continues to expand coverage across small businesses with OptBlue while providing innovative, value-added small merchant services. Learn more about the tools and resources available to help you and your merchants grow business with OptBlue.
- **Recent Changes in Working Capital, How ISOs Can Take Advantage, Governors Ballroom 5 & 6**  
*Andrew Altschuler, Strategic Funding Source,*  
Working capital products come with significant revenue streams and are also a great way to prevent portfolio attrition. Discuss how to align with a company that will lend responsibly and protect your ISO's and merchant's interests.