

Operations & Technology Conference LIVE!

Tuesday, September 14, 2021

The Future of Work



TUESDAY, SEPTEMBER 14

9:30 – 11:00am ET

Welcome, State of the Association and Industry and Keynote (Joint Session)

Welcome

Presenters:

JENNIFER MARTIN

Chair, ELFA Operations & Technology Committee
SVP, Sales Enablement and Initiative Support
Key Equipment Finance

JOHN BOBER

Chair, ELFA Financial Accounting Committee
Director
The Alta Group LLC

State of the Association and Industry

Presenters:

RALPH PETTA

President & Chief Executive Officer
Equipment Leasing and Finance Association

KRIS A. SNOW

President
Cisco Systems Capital Corporation
Chair of the Board, ELFA

Keynote Address

BRIAN SOLIS

"Hey Mr. Futurist!"

WTF...What's the Future...of Work"



Best-Selling Author, Digital
Anthropologist, Futurist, and
Global Innovation Evangelist at
Salesforce

- Named to Silicon Valley's "40 under 40" and called one of the "25 Twitter Accounts That Will Make You Smarter" by Mashable
- Prolific author of *The End of*

Business as Usual named a "Top 10 Business Book" by
Publisher's Weekly

Heralded as one of the 'top 10 people to know in Silicon Valley', and considered "one of the most important thought leaders of our time" and "one of the more creative and brilliant business minds of our time," Brian Solis shares his vision, research and experiences to help you understand and embrace the dynamics defining the rise of digital transformation, innovation, connected consumerism and digital lifestyles.

Brian is indeed 'Mr. Futurist'. Not one to fly-by convention, Brian has personally influenced and shaped business and media through his work, lead numerous programs for Fortune 500 companies, notable celebrities, startups and is globally recognized as one of the most prominent thought leaders and published authors in new media. As a digital anthropologist, he humanizes technology trends to make sense to everyone at every level.

Join Brian and our virtual event community for a presentation your future-self will thank you for!

11:00 – 11:30am ET

Networking Lounge Open

Use this time to chat live with fellow attendees via video and microphone in the Lounge, post on the social wall or schedule 1-on-1 meetings!

11:30am – 12:30pm ET

Operations & Technology Excellence Award Presentation

Now in its nineteenth year, the Operations & Technology Excellence Award program is designed to recognize noteworthy achievements in operational and technology innovation in our industry. In this session, we will honor this year's award winners and showcase their award-winning solutions. Hear from our award winners as they share insights gleaned from their unique project experiences.

Discussion Leaders:

TAWNYA STONE, CLFP

Chair, Award Sub-Committee
GreatAmerica Financial Services

Award Winner:

Chicago Freight Car Leasing Co., a Sasser Family Company

BROCK MORRISON

Sasser Family Companies

ANGELITA BRANCH

Sasser Family Companies

JOSH CHESSE

Chicago Freight Car Leasing Co.

GINA LOCACCIATO

Sasser Family Companies

12:30 – 1:15pm ET

O&TE Award “Spotlight Talk” in the Lounge

Now that you have heard from the Operations & Technology Excellence Award Winning project, take some time to talk with two Spotlight companies who submitted for the Award. What were their projects? How did they impact their company? These two projects are noteworthy, interesting and their stories are compelling! You will absolutely want to hear about these amazing projects!

- Spotlight Talk with **Canon Financial Services**
- Spotlight Talk with **KWIPPED, Inc.**

Take some time to chat!

1:15 – 2:15pm ET

Breakout Sessions

Below are two breakout session options covering multiple topics.

1. **Leading the Future of Work - Considering Unconscious Bias in Design, Data & Technology**

How do we design solutions that serve the needs of all customers and users? How can we uncover and understand unconscious bias in our data, processes and systems? Hear from computer scientist Dr. Jennifer Golbeck in a guest speaker session that will catalyze thought and encourage you to deliver a more inclusive user experience for all.

Discussion Leaders:

STEPHANIE CASE

DLL

ELFA Equality Committee Liaison

KEELIE FITZGERALD

Odessa

JENNIFER GOLBECK

Computer Scientist, Director of Social Intelligence Lab,
Professor
College of Information Studies, University of Maryland

LISA NOWAK

IDS

2. **Leading the Future of Work - The Composable Enterprise & You Can't Digitize Humanity**

[Part 1] The Composable Enterprise

[1:15 – 1:45pm]

In a world where constant change is the norm the old monolithic systems no longer suffice. By using a modular business and technology strategy you can create, innovate, and adapt in order to rapidly seize market opportunities and respond to disruptors and threats, while maintaining resilience. Come learn ways to compose the enterprise of the future.

[Part 2] You Can't Digitize Humanity

[1:45 – 2:15]

The rise of the robot has struck fear into our minds. While sci-fi has depicted a world taken over by an artificial intelligence, the reality is much more balanced. This half hour we will explore real life use cases both from within and outside of our industry where digital technology is being leveraged to augment the person-to-person connection.

Discussion Leaders:

CHAD CARLSON

Tamarack Technology, Inc.

TINA CARTWRIGHT

U.S. Bank Equipment Finance

ANDREW COTTER

Somerset Capital Group, Ltd.

STEVE NELSON

TD Equipment Finance, Inc.

SHEILA OLIVER

John Deere Financial

DENIS STYPULKOSKI

Reimagine Advisors

2:15 – 2:45pm ET

Networking Lounge Open

Use this time to chat live with fellow attendees via video and microphone in the Lounge, post on the social wall or schedule 1-on-1 meetings!

2:45 – 3:45pm ET

General Session (Joint Session)

The End of LIBOR – Transitioning from LIBOR to Replacement Rates

This session will examine the phase out of LIBOR benchmark rates to new benchmark rates (SOFR). Panelists will discuss: the switch from LIBOR, the alternative reference rates and how these differ from LIBOR. They will also examine the transition from multiple impacted areas of the business: Documentation, Operations, and Technology.

Discussion Leaders:

RIC ANDERSEN

Key Equipment Finance

LEONARD LANE

Odessa

JEFF LEZINSKI

Odessa

JENNIFER MARTIN

Key Equipment Finance

3:45 – 4:15pm ET

Networking Lounge Open

Networking Time! Chat with fellow attendees in the Lounge, post on the social wall or schedule 1-on-1 meetings!

4:15 – 5:15pm ET

Breakout Sessions

1. Leading the Future of Work – **Innovating Apart** [4:15 – 5:15pm]

2020 was a lot about "making it work" amidst unforeseen and uncertain circumstances. The initial focus was how to keep the business going with a distributed workforce. That focus has now shifted to how to keep an innovative culture and thrive as businesses embrace this concept (at least partially) in the future.

Learn how others have navigated this challenge and transformed their businesses, potential tools for collaborating effectively and best practices for optimizing engagement to deliver excellence. Businesses are no longer operating the way they did in 2019—ensure you are proactively creating a culture of innovation and developing cohesive relationships in the new world of distributed workforces.

Discussion Leader:

PETER HAUG

LTi Technology Solutions

Speakers:

DEBORAH REUBEN, CLFP

TomorrowZone

MARK TOMASELLI

Innovation Finance USA LLC

2. Leading the Future of Work - **Leadership in Times of Uncertainty & Every Leader is a Technology Leader**

With another "hundred-year event" behind us, what are the most effective techniques leaders employed to move their businesses forward in an uncertain time? Perhaps courageous leadership is not fearless leadership. Times of uncertainty are not bound to a pandemic, yet this latest evolution of work and the radical challenges to 21st-century leaders are unique. What tools do you need to navigate and successfully work through your next uncertain time? Join us as we discuss **Leadership in Times of Uncertainty** and what today's environment has proven: **Every Leader is a Technology Leader**.

Discussion Leaders:

DANIELA CARIJO WEITMANN

DLL

MARK FARLIN

LEAF Commercial Capital Inc.

KEELIE FITZGERALD

Odessa

KEITH GOEPFERT

TCF Capital Solutions, a division of TCF National Bank

RON MEYER

Linedata Lending and Leasing

STEVE NELSON

TD Equipment Finance, Inc.

LISA NOWAK

IDS

CANDACE REINHART

CoreTech Leasing, Inc.

RAFAEL ROSATO

DLL

5:15 – 6:15pm

Virtual Networking Reception

MIX and MINGLE with other attendees and share your takeaways from the day. Join In on the FUN!

Cameras and microphones will be enabled so you can talk LIVE! with your fellow attendees, introduce your pets, say hello to significant others and children!

Have fun.

This is an open reception and a place for you to relax and chat after a GREAT day of session content.

