

Small Ticket Best Practices Roundtable
April 16, 2024
Hilton Palmer House, Chicago

11:00 am – Noon	Check-in/Registration
Noon – 1:15 pm	Networking luncheon Held jointly with the attendees of the Bank, Captive and Vendor Finance, and Independent Roundtables. Welcome Leigh Lytle President and CEO Equipment Leasing and Finance Association
1:15 – 1:30 pm	Break
1:30 – 4:00 pm	SMALL TICKET BEST PRACTICES ROUNDTABLE Unlocking Cost-Effective Efficiency Solutions in a Higher Cost Environment
1:30 – 1:35 pm	Introduction Rob Ceribelli President Channel Chair, Small Ticket Business Council Steering Committee
1:35 – 2:35 pm	Solutions Impacting the <i>Front-End</i> of Our Business – Application to Booking In a world where costs are rising, finding innovative and cost-effective solutions is crucial for business success. By utilizing efficient technology, streamlining processes, and optimizing resources to do more with less, companies can enhance productivity, save money, and maintain a competitive edge. The panel's exploration of these strategies will provide valuable insights on how to achieve success by implementing efficiencies. The discussion will delve into the realms of the front-end of the transaction to successfully tackle high-cost challenges and navigate creative solutions in today's business landscape. Moderator Jennifer Martin, CLFP Chief Product Officer LTi Technology Solutions

Speakers

Brian Tri

Chief Credit Officer
Channel

Nate Gibbons, CLFP

Chief Experience Officer
QuickFi

Daryn Lecy, CLFP

Chief Operating Officer
Oakmont Capital

2:35 – 2:50 pm

BREAK

2:50 – 3:45 pm

Solutions Impacting the *Back-End* of Our Business – Post-Booking to Asset Disposition

1. Outsourcing – success using offshoring
2. Self-service – how to offer tools to customers to enable them to self-service instead supporting every request
3. Automation – where have we deployed BOTs or AI to create efficiencies (DLL)

How have regulatory changes impacted efficiency and how are you responding?

How are you balancing allowing variation and options in your support to your customers and partners, versus standardization to drive efficiency?

Moderator

Rob Ceribelli

President
Channel

Speakers

Greg Sting

President of the Americas
PEAC Solutions

Quentin Cote, CLFP

President and Chief Revenue Officer
Orion First Financial, LLC

Blake Rathburn

Head of Operational Excellence
US Transformation, DLL

3:45 – 4:00 pm

Wrap-up