

Sponsor Prospectus

21-23 April 2015
Boston

**2015 CEB Financial
Services Technology Summit**



Competing with Your Customer

The 20th annual CEB Financial Services Technology Summit is approaching and it promises to be better than ever. I invite you to sponsor and shape this unique event for Financial Services line of business leaders, marketing executives, senior technologists and CIOs, and the ecosystem of providers that support them.

Revenue growth is one of the biggest challenges facing financial institutions today as growth remains mixed. Firms have invested significantly in new capabilities and service models to differentiate, yet these efforts have largely failed. Our research reveals that one of most formidable drivers of competition that financial institutions face today comes from an unexpected source: their own customers.

With increased access to information before purchasing, “empowered customers” are less brand loyal, more likely to switch, and more likely to disintermediate suppliers from their decision-making processes. CEB research shows that the average purchase decision is almost 60% complete before the customer’s first contact with a potential provider. This year’s summit will focus on how technology is enabling financial institutions to act on the two critical components of a strategy that wins in the face of empowered customers:

Client-Facing Communication—Engage customers where they are learning more effectively.

- Digital purchasing trends in customer needs and behaviors
- New service analytics and data management
- Teaching and challenging in multichannel sales
- Unlocking the rewards of social and mobile networks

Staff Enablement—Equip employees to connect better with empowered customers.

- Next-generation productivity capabilities that support new sales models
- Harnessing the employee network to enhance collaboration
- Aligning business and IT with the “digital customer”
- Review of innovative technologies that boost employee performance

Our sponsorship offerings give you a platform to teach executives and inform their decision making by showcasing your expertise, sharing real-world case studies, and provoking discussion. Take advantage of the best of the inventory available now. We look forward to working with you and your team.

Matthew Dixon, PhD
Executive Director

2014 Summit

Total Attendance

500+
attendees

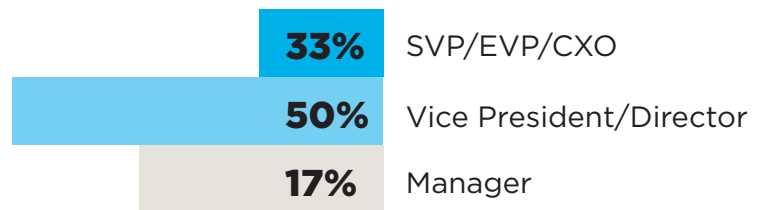
240 unique
institutions

25 countries
represented



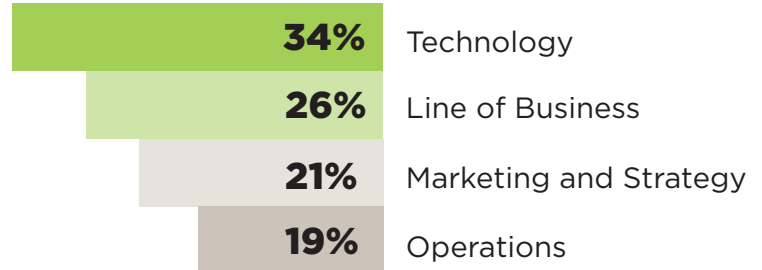
Distribution by Seniority

Financial Services Institution Attendees



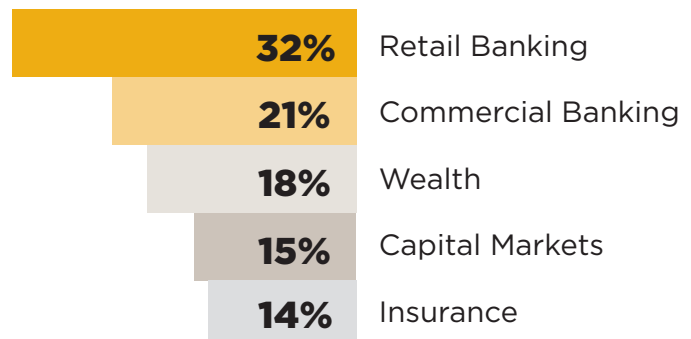
Distribution by Role

Financial Services Institution Attendees



Distribution by Business Line

Financial Services Institution Attendees



2014 Feedback

1PaulRobinson

Great event, agenda and discussions. Thank you all at CEB and industry presenters & attendees.
#CEBSummit pic.twitter.com/sjUFctITus

TOC79

Excited to be participating at #CEBSummit! Tx for having me!
@CEBTowerGroup

shelleyann72

Yes we do! RT @CEBTowerGroup: All of our 28,000 employees in the US serve at the pleasure of the customer.
Linda Verba, TD Bank #CEBSummit

vishakjai

Awesome insight—more luggage lost, flights delayed than ever in 2013, but customer satisfaction higher for airlines in 2013!!
#CEBSummit

Gemuntz

Enlightened by keynote on Code Halos.
#CEBSummit

trgribble

At #CEBSummit—looking forward to a great 3 days!

ChrisMcGinnis99

Fascinating keynote from @FourSeasons on the secrets of delivering exceptional customer experience.
#CEBSummit

PJHines

Enjoying the #CEBSummit & catching up with former colleagues.

“**Great research, outstanding** keynote speakers, robust agendas; something for everyone. Well done.”

“Good conference, **well managed**, excellent content at the right level.”

“Great summit; excellent keynote speakers and breakout sessions.”

“I very much enjoyed the summit and the opportunity to interact with folks from other financial institutions as well as to **hear about some of the trending and future considerations.**”

Attendee

“I’ve **never seen a booth rush** like that, anywhere in my life.”

“This is far and above the **best event we’ve ever been involved with.**”

“We could never, EVER, have pulled off something like this **without your partnership.**”

Sponsor

Twitter

What's New for 2015

Elite Benefits

Elite rewards linked to contribution:

Silver, Gold, and Platinum benefits accrue based on total sponsorship commitment.

Silver

Spend \$25,000–\$49,999

Rotating banner ad in mobile app
+ 2 additional staff passes (4 total)

Gold

Spend \$50,000–\$79,999

Registrant names prior to summit
+ 2 additional staff passes (6 total)

Platinum

Spend \$80,000+

Choice of session/event time slots
+ 2 additional staff passes (8 total)

One piece of content included
in the post-event “For Further
Reading” section of site

Elite benefits include all items at and below qualifying spend-based threshold.

Enhancements

Increased value from entry-level sponsorship:

Now includes two staff passes, ten client/prospect passes, branding as a summit sponsor, a post-event attendee list and a detailed sponsor profile in the mobile app.

Completely flexible package design:

All sponsorship components are priced à la carte and can be configured in any combination to align with your goals.

Intimate teaching opportunities:

More options are available for sponsors to engage directly with executives, including topic-based roundtables, invite-only luncheons, and advisory boards.

Interactive exhibits:

Our reimagined exhibit hall features kiosks instead of booths with dedicated agenda time to explore—increasing engagement while reducing sponsor expense and effort.

Sponsorship Options

Sponsor the Summit	Member Price	Non-Member Price
<p>Basic Sponsorship¹:</p> <ul style="list-style-type: none"> ■ Two Staff Passes ■ Ten Guest Passes ■ Branding on Web Site and On-Site Signs ■ Sponsor Profile in Mobile App ■ Participant Info After Event (Name, Title, Firm, Mailing Address) 	\$7,500	\$9,000
<p>Customize Your Sponsorship</p>		
<p>Showcase Your Insights</p> <ul style="list-style-type: none"> <input type="checkbox"/> Plenary Thought Leadership Address (Sold out) <input type="checkbox"/> Advisory Board <input type="checkbox"/> Breakout Session (Panel or Presentation) <input type="checkbox"/> Thought Marketing Collateral <input type="checkbox"/> Technology Analysis Panel Seat 	<p>\$50,000</p> <p>\$20,000</p> <p>\$20,000</p> <p>\$15,000</p> <p>\$0²</p>	<p>\$60,000</p> <p>\$25,000</p> <p>\$25,000</p> <p>\$18,000</p> <p>\$15,000²</p>
<p>Grow Your Network</p> <ul style="list-style-type: none"> <input type="checkbox"/> Private Evening Event <input type="checkbox"/> Private Luncheon Event <input type="checkbox"/> Topic-Based Roundtables 	<p>\$20,000³</p> <p>\$15,000</p> <p>\$5,000</p>	<p>\$25,000³</p> <p>\$18,000</p> <p>\$6,000</p>
<p>Build Your Brand</p> <ul style="list-style-type: none"> <input type="checkbox"/> Exhibit Hall Presenting Sponsor (Sold out) <input type="checkbox"/> Charging Lounge Host <input type="checkbox"/> Mobile App Sponsorship <input type="checkbox"/> Wifi Sponsorship <input type="checkbox"/> Conference-Wide Cocktail Host <input type="checkbox"/> Exhibit Kiosk <input type="checkbox"/> Private Meeting Room <input type="checkbox"/> Room Drop <input type="checkbox"/> Branded Item Distribution 	<p>\$25,000</p> <p>\$15,000</p> <p>\$12,500</p> <p>\$12,500</p> <p>\$10,000</p> <p>\$5,000</p> <p>\$5,000</p> <p>\$3,000</p> <p>\$2,500⁴</p>	<p>\$30,000</p> <p>\$18,000</p> <p>\$15,000</p> <p>\$15,000</p> <p>\$12,000</p> <p>\$6,000</p> <p>\$6,000</p> <p>\$3,500</p> <p>\$3,000⁴</p>
<p>Enhance Your Participation</p> <ul style="list-style-type: none"> <input type="checkbox"/> Additional Staff Passes <input type="checkbox"/> Lead Capture Device Rental 	<p>\$1,795</p> <p>\$350</p>	<p>\$1,995</p> <p>\$350</p>

¹ May be purchased standalone. Required in order to purchase any a la carte sponsorship options.

² Participation by invitation only.

³ Food, beverage, venue, and transportation expense not included.

⁴ Item production cost not included.



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