



## 56<sup>th</sup> ELFA ANNUAL CONVENTION

October 22 – 24, 2017

JW Marriott Orlando, Grande Lakes • Orlando, Florida

### CALL FOR PRESENTATIONS

**Submission Deadline July 3, 2017**

Equipment finance is on the rise, but the secret to success in today's changing marketplace isn't "business as usual." The most successful equipment finance companies are preparing for evolving markets and adapting their business operations to tap into new opportunities.

The theme for the 56<sup>th</sup> ELFA Annual Convention is "*Building the Next Generation Business.*" This theme opens doors to examine and discuss a number of trends facing the industry.

If you have an idea for a session you would like to present at this year's Annual Convention, please keep the following Convention objectives in mind:

#### **Changing customer needs and driving new opportunities and challenges**

- Connect with your business partners, funding sources, vendors and customers
- Flourish as a person, as a company and as an industry
- Grow your reputation and your market share
- Participate in association activities
- Expand your knowledge

#### **End-users seeking greater access to business solutions and services with an increased focus on flexibility and convenience**

- Grow and solidify your relationships
- Exchange ideas and best practices
- Make your voice heard on policy and regulatory issues
- Develop your leadership skills and foster emerging talent
- Invest in the success of your business, your staff, your industry and your career
- Maximize your ELFA membership benefits

#### **Policy**

- Build your understanding of the global marketplace
- Stay relevant in a fast-changing world

- Gain an edge by innovating your business operations

## Take Your Place Among Our Industry's Prized Resources

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We invite you to submit a proposal outlining your presentation for a session at the 56th ELFA Annual Convention. Your proposal will be carefully reviewed by a committee of your peers. If selected, you will be invited to make a presentation or lead a roundtable discussion at one of several time slots scheduled for Monday, October 23 or Tuesday, October 24.

Please read this document thoroughly before submitting your proposal. ELFA anticipates that once again we will receive more proposals than presentations slots available. Please avoid submitting proposals that have too narrow an audience or proposals that have a substantially wider appeal will be given priority. **And most important: do not submit proposals that appear to be selling a product or supplying a service.**

## Session Topics/Issues of High Priority

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In addition to the issues mentioned above, ELFA reached out to its Business Council Steering Committees asking for guidance on the kinds of issues/topics that should be discussed and/or showcased at this year's Annual Convention. These committees represent the major business segments of the industry: small ticket, independent, financial institutions, captive and vendor finance, and service providers. Below is a summary of their suggested session/topic ideas. This list is not meant to be exhaustive, and is provided to serve as a general guide to the kinds of topics that will be given priority at this year's Convention.

- New lease accounting standards; impact on the leasing and finance company; impact on your customers
- Update on growing market segments: e.g., software investment, aircraft, industrial equipment
- Where will growth come from: domestically? Internationally?
- Margin compression: How can companies add additional value for their customers to counteract the trend toward margin compression?
- Systems implementation and integration: how to integrate CRM systems, back-end and front-end
- Compliance issues as they relate to systems, operations or transactions
- Compensation trends, employee engagement, and emerging talent retention
- Financing assets that are deployed in the Cloud
- Nontraditional financings growing role in equipment finance
- Managing residual risk
- Balancing the need for growth against the cost of expansion
- Improving market conditions to increase credit supply and demand for equipment acquisitions
- Trends in managed solutions vis-à-vis, accounting, systems, legal, and other issues that impact ability to meet customer needs
- What are the different models (e.g., private label vendor, joint venture, fully-funded on book) manufacturers are using for their captives, and the pros and cons of each

- How do companies address the deployment of a global finance solution? Are there best practices?
- Changing Technology: How can companies keep up with technology, for both marketing to customers and in operating their companies? With the current movement towards cloud computing, what equipment might become obsolete? Will telecom all be serviced through IP? For the leasing company considering cloud computing for its own operations, what problems are posed?
- Regulatory Changes that pose opportunities and threats, including uncertainties surrounding the economy and government regulation
- Your value proposition: what value do you bring to your customers? Your parent?
- Issues surrounding operational efficiencies
- Best practices in recruiting, hiring and retention
- E-Signatures: Do they offer a competitive advantage? What is required?

## **Other Issues Worthy of Consideration**

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### **Marketing Strategy**

Proposals that discuss:

- Prospecting for customers: what value are you providing to attract and keep customers?
- Modifying business models to adjust to changing customer needs
- Customer retention strategies

### **The "Business" of Running the Business**

Proposals that discuss:

- Increasing operational efficiencies; streamlining processes
- Increasing transparency with customers
- Applying technology that results in greater efficiencies, lower costs, or added capabilities
- Portfolio performance/risk management: Are you creating opportunities or limiting returns? Is your risk tolerance in line with your value proposition?

### **The Business Climate**

Proposals that discuss:

- Scrutiny of business practices with customers and channel partners
- Improving image and brand recognition among regulators, customers, funders and others
- Impact and benefits of new sources of capital
- New technology and alternative forms of financing challenging traditional business models
- New markets; new opportunities
- The effect of regulatory, accounting and tax changes on new business opportunities
- The effect of improving market conditions to increase credit supply
- Impact of short-term interest rates

### **Funding/Capital Markets**

Proposals that discuss:

- Innovations in financing products
- Funding strategies: what works now
- Nontraditional financing role in equipment investment

### **Human Capital Issues**

Proposals that discuss:

- A new generation is entering the workforce, changing the rules for attracting and retaining talent.
- Keeping employees engaged: motivating, rewarding and retaining people during turbulent times
- Building a workforce of the future
- How have changes in strategic direction shifted the skills and performance capabilities now needed in equipment finance companies?
- The leadership issue: How do you effectively prepare for turnover at the executive level?

### **Format: Concurrent Breakout Sessions or Roundtable Discussions**

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Session proposals should describe the kind of format you will be using to present and share information.

- **Breakout Session:** A formal presentation with a number of speakers, facilitated by a moderator. Q&A included as part of the presentation. The primary focus is to provide information and share knowledge on current or critical issues.
- **Roundtable Discussion:** Sessions that foster interaction and networking in a less formal, more intimate setting. Attendee feedback over the years suggests that members place high value on the ability to exchange ideas and share best practices. If you submit a Roundtable proposal, it is assumed that you (or someone of your choosing) will lead a facilitated discussion, therefore please provide a sample list of discussion questions as part of your proposal.

If your proposal is accepted, it will be placed in one of the following time slots:

- Monday morning, October 23, immediately following the General Session
- Monday afternoon, October 23, following the General Luncheon
- Tuesday morning, October 24, immediately following the General Session
- Tuesday afternoon, October 24, immediately following the Business Council Luncheons

**Please note:** Sessions range in time between 90 minutes for morning sessions, and either 75 minutes or 90 minutes for afternoon sessions.

### **Selection Criteria**

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**ELFA will make every attempt NOT to combine proposals submitted on similar topics from different proposals.** While we want as many qualified individuals and companies represented on the convention program, we want to avoid diluting what might otherwise be an important session. Whenever possible, ELFA will select the best proposal submitted rather than combining proposals. **However, when two proposals are compatible and combining them results in a higher quality session, ELFA reserves the right to ask individuals to work together in developing a single session.**

Proposals will be evaluated based on the following criteria:

- a. Timely information on selected **topics of current interest** that illustrate out-of-the-box thinking, demonstrating an ability to adapt to changing market conditions.
- b. **Case studies** that highlight value: application or introduction of new or improved processes, strategies, or products; or excellence in leadership or management of a company or business unit
- c. **Research/benchmarking results** that point to trends
- d. Sessions that stress **peer-to-peer networking and information sharing**

- e. Sessions that are of particular interest to **specific market segments** (e.g., small ticket, middle market, vendor programs) or **emerging or growing markets** (e.g., energy, infrastructure)

### Important Deadlines

- **July 3, 2017:** All proposals must be postmarked no later than Monday, July 3, 2017
- **July 31 – August 4, 2017:** Acceptance notices will be distributed during the week of July 31 – August 4, 2017.
- **October 2, 2017:** Handout materials are due to ELFA on Monday, October 2, 2017

### Additional Selection Criteria

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- Any one presenter or company may submit no more than two proposals
- ELFA member companies will be given priority, however non-members may submit proposals as well
- The topic is of interest to a majority of the convention attendees
- The written proposal captures the most critical issues related to the topic to be presented or discussed
- If appropriate, the proposal identifies additional qualified individuals (including consultants, professors, professionals and others) who will be included among the presenters. *It is highly encouraged that your panelists, whenever possible, represent diversity in terms of gender, age, ethnicity and race.*
- The proposal suggests a presentation format appropriate to the topic (breakout session or roundtable discussion)

### Some General Information You Should Know

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- The ELFA Annual Convention is the largest annual gathering of professionals in the equipment finance industry. Attendees are generally the most senior level staff, including CEOs, Presidents, General Managers, Marketing Directors, Sales Directors, Senior Vice Presidents and other professionals responsible for business development
- Presentation handouts from sessions will be posted on the ELFA website and in the ELFA Events mobile app. They will be offered free to registered attendees, and will be sold to other individuals for a minimal amount. Handouts will not be posted without your express permission. Handouts will be posted in a PDF format, thus preventing individuals from tampering or altering your original in any way.
- A well-attended session generally has 40 to 60 individuals in the room. If your topic is particularly "hot," you might get 75 to 100 in attendance.

- All convention attendees, including presenters, pay the ENTIRE convention registration fee. However, if a speaker is a consultant or academic who would not otherwise attend the ELFA Convention, the convention fee is waived.
- Standard session rooms are equipped with an LCD projector, screen and microphone in a theatre type setting or round tables, depending on the session type. Rooms can be arranged in a different format as your session requires. These details will be discussed AFTER session approval.

### **Authorization to Record Your Session**

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The ELFA will be audio-recording breakout sessions presented at the Annual Convention and will post these on the ELFA website synchronized with the appropriate handout materials or power point slides. These will be provided to all convention attendees (both ELFA members and non-members) as part of their registration fee. Recordings and handouts will not be posted without your express permission. Please note: when submitting your speaking proposal, please indicate your willingness to have your session recorded and your handouts materials posted to the ELFA website.

### **Entry Instructions**

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**Entries must be received no later than 11:59 pm EST, Monday, July 3, 2017**

**Entries will be accepted and are preferred electronically.**

If you are unable to access the electronic form due to office security policies, please follow the instructions below and submit a word document submission.

**INCLUDING your cover sheet, please LIMIT YOUR ENTIRE PROPOSAL TO A TOTAL OF THREE PAGES**

1. Please submit a Cover Sheet with your proposal that includes the following information:
  - a. Your name, title, company, address, phone, e-mail
  - b. Indicate the Program Format for which you are submitting (Breakout Session or Roundtable Discussion)
  - c. Indicate the Intended Market(s) (small ticket, middle market independent, captive and vendor programs, etc.)
  - d. Identify Your Co-Presenters (if any, and if known at time of submission). Please note: confirm their interest before listing their names!
  - e. Indicate your willingness to have your session recorded and your handouts materials posted to the ELFA website.
2. Any one presenter or one company may submit no more than two proposals.
3. On the remaining two pages, please include as succinctly as possible in the following order:
  - Presentation title
  - One to three learning objectives (by the end of this session/roundtable, attendees will have learned the following.)

- A 100-300 word abstract (description of the session/roundtable content) including why this topic is important.
  - Intended audience (include general functional areas, e.g., corporate executive, marketing director, sales manager, etc.)
  - If submitting a roundtable proposal, please provide a sample list of discussion questions as part of your proposal.
  - Brief biographical information establishing credentials for all presenters. Please indicate if there are any expenses related to any of your intended presenters.
4. **The preferred method of submitting your proposal is via electronic form**; however, if you are unable to access the form due to office security policies, please submit via email. Please email your proposal to Heather Staverman at [hstaverman@elfaonline.org](mailto:hstaverman@elfaonline.org). You may also mail your proposal to: Call for Presentations, Equipment Leasing and Finance Association, 1825 K Street, NW, Suite 900, Washington, DC 20006. You may also fax your proposal to: Heather Staverman at (202) 238-3427. All proposals must be postmarked no later than **Monday, July 3, 2017 or submitted electronically by 11:59 pm EST, Monday, July 3, 2017.**
5. Expect notification from ELFA of the status of your proposal status during the week of July 31 – August 4, 2017. If you have questions, or need assistance, please call Heather Staverman at (202) 238-3427.

Please note that proposals will be judged on the focus and clarity of the abstract, and the relevance, practicality, audience appropriateness, and transferability of the content.