Insight Exchange Network

Presents

#IENSUBPAY

SUBCOM: Subscription Payments Exchange

Key Billing & Payments Strategies for Maximizing Recurring Revenue

July 30-31, 2018 ▪ Marines' Memorial Club ▪ San Francisco, CA

HEAR DIRECTLY FROM PRACTITIONERS WITH EXPERIENCE AT BRANDS LIKE:

TINDER, ADOBE, LINKEDIN, SPOTIFY, AMAZON, SONY, UBER, GOOGLE, MAILCHIMP, TWITCH, SYMANTEC, SHUTTERSTOCK, PATREON, FACEBOOK, NETFLIX, DROPBOX, IPSY ...and many more!

Insight Exchange Network

Join us in San Francisco July 30 - 31 for our first annual **SUBCOM: Subscription Payments Exchange**!

You asked for it and we answered: Based on the success of our **SUBCOM Summit**, we've decided to get granular with one of the more persistent pain points for subscription-based businesses—recurring billing & payments processing!

While there are several conferences out there dedicated to solving issues in the larger payments space, we've recognized a need for an unbiased industry event that deals head-on with the unique challenges faced by companies involved in automatic and recurring billing and payments processing.

Subscription Payments Exchange is a practitioner-led educational and networking forum. Our speakers aren't selling anything! This conference features a plethora of actionable practitioner use cases—lessons and insights from which attendees will be able to bring back to their own companies and begin using right away.

Key topics to be discussed include:

- Thinking beyond the card – a deep-dive into alternative payment methods
- Global solutions for mobile payments
- How to know when it's time for local acquiring
- Regulatory and compliance crash course for recurring payments
- A/B testing for dynamic retry – get better at blasting involuntary churn
- How approach a billing optimization framework
- How to successfully integrate with a payments' vendor
- Fraud and security in the new recurring payments ecosystem
- Addressing involuntary churn with limited internal resources
- Leveraging machine learning to optimize payments success
- Bitcoin and cryptocurrencies – the future of digital payments?

...and so much more!

All in all, this is a not-to-be-missed event! Please make sure to check out our discounts for multiple registrants from the same company for the opportunity to educate and inspire your entire team.

We can't wait to see you in San Francisco for this special event!

Sincerely,

Meg Freitag
Content Director
INSIGHT EXCHANGE NETWORK, LLC

Top reasons to attend:

- Sit in on our *Opening Executive Panel: Subscription Payments State-of-the-Industry* and get a panoramic view of the newest trends, challenges, and opportunities impacting the subscription payments and billing space. Panelists include **Tinder's** Jeff Morris, **LinkedIn's** Suhil Srinivas, **ipsy's** Nipun Sachdev, and Michelle Vautier from **Patreon.**
- Join us for a session on a comprehensive session on how to know when your company's ready for local acquiring, led by Sheela Ursal, founder of **Fintech Launch** and previously Head of Global Digital Payments Product Management at **Amazon**.
- Learn from Mei Lee Quah, Industry Principal of Telecoms & Payments Strategy at **Frost & Sullivan** as she discusses her experiences with global solutions for mobile payments and other alternative payment methods.
- Collect high-level insights from a number of seasoned practitioners at notable brands. Our special in-depth use cases will feature bright minds from companies such as **Adobe**, **Mailchimp**, **LinkedIn**, **Symantec**, **Dropbox,** and more!

Who should attend:

- CEOs, CFOs, and COOs of subscription-based companies
- VPs, Directors, Product Managers, and other decision-makers in the areas of:
    - Payments
    - Operations
    - Revenue and Finance
    - Accounting and Billing
    - Retention
    - Monetization
- Service and software vendors offering solutions for subscription management, billing, and payments processing

Day One July 30, 2018

8:00 – 9:00
Registration and Breakfast

9:00 – 9:15
Chairperson's Opening Remarks

Monica Dabaghi, Sr. Manager, Product Management, Global Payments, Fraud, and Tax
SONY INTERACTIVE ENTERTAINMENT

9:15 – 10:15
OPENING EXECUTIVE PANEL: Subscription Payments State-of-the-Industry

This lively, in-depth discussion will set the stage for the two days of talks that follow. Hear how leading merchants from different corners of the industry are approaching ecommerce payment management as a strategic function and competitive differentiator. They will talk candidly about the current state of recurring payments, the best practices they employ, their own successes and failures, and what we can expect for the future.

Topics to be discussed will include:

- How do recurring payments necessarily differ from on-off transactional—what are the added challenges? What are the benefits?
- What are successful recurring revenue giants like Netflix, Spotify, Uber, and AirBnb, doing to constantly stay ahead of the curve?
- Addressing unique challenges: B2B vs. B2C, digital goods or services vs. physical goods, enterprise vs. startup, and more
- Bitcoin and cryptocurrencies—the future of digital payments or overhyped?

...And more!

Moderator:

Indus Khaitan, Head of Growth
CHARGEBEE

Panelists:

Jeff Morris, Director of Product, Revenue
TINDER

Suhil Srinivas, Head of Products – Premium Growth & Commerce
LINKEDIN

Michelle Vautier, Head of Payments & Risk Product
PATREON

Nipun Sachdev, Lead Product Manager, Mobile & Web
IPSY

10:15 – 10:50
DIAMOND KEYNOTE: Subscription Benchmarks—Payment Declines and Strategies for Improving Transaction Success

Benchmark data provides an invaluable gauge for measuring business performance. Recurly has unique visibility into a variety of subscription metrics based on processing hundreds of millions of transactions from subscription businesses across a wide-range of industries. In this session, Recurly will share benchmark research on payment declines and the strategies subscription businesses can employ to improve transaction success rates.

Robert Oswald, VP of Sales
RECURLY

10:50 – 11:10
Networking break

11:10 – 11:45
USE CASE: Thinking Beyond the Card—Global Solutions for Mobile Payments

Key talking points include:

- The need for a global solution for e-money that can complement cards and together with cards replace cash
- How needs change depending on a company's country of incorporation and customer base location
- Keeping an eye on outliers — just because a method is popular widely doesn't mean it's right for your customer base
- Key success factors for global interoperability of common payment options — balancing the need for global alignment while meeting local needs and preferences
- P2P and cryptocurrency

Mei Lee Quah, Industry Principal – Telecoms & Payments Strategy
FROST & SULLIVAN

11:45 – 12:20
USE CASE: How to Know When It's Time for Local Acquiring

How do you know when it's time to set up a local entity abroad? What should you know going in? Listen to one international subscription powerhouse talk about the process leading up to putting down roots in another country.

Sheela Ursal, Founder
FINTECH LAUNCH
(formerly Lead Payments Product Management & Expansion at **AMAZON** and **WESTERN UNION**)

12:20 – 1:20
Networking Luncheon

1:20 – 1:50
USE CASE: Regulation & Compliance for Recurring Payments

Get up to date on the latest for PCI compliance and other regulatory hurdles you need to be aware of (and how these manifest on the ground in a business setting) from a leading SaaS company.

Bart Phelps, Senior Payments Manger
MAILCHIMP

1:50 – 2:25
USE CASE: Overcoming Challenges in Operating a Two-Sided Payments Network

Twitch is a global video platform which allows creators to earn an income from subscriptions, digital goods, and ads. Twitch's vision is to reach millions of paid creators with real time global payments and payouts. This session will discuss challenges they've faced in pursuit of this vision, specifically regarding global payments (including offer-presentment, legal entity creation, and funds flow) and central payouts issues stemming from multiple lines of business, manual back office processes, and payouts method preferences by country.

Greg Bae, GM Subscriptions & Payments
TWITCH

Steven Tang, Product Manager
TWITCH

2:25 – 3:05

USE CASE: How to Approach Billing Framework Optimization

Billing optimization is a crucial tactic employed by subscription billing merchants to minimize churn, increase customer retention and ensure undisturbed service offering. In this session, attendees will get a look behind the scenes at some of the successful techniques used by industry leaders including timing strategies, outreach, customer messaging, and more.

Key discussion points will include:

- Timing strategies (day of the week, time of the day, frequency)
- Customer messaging: email vs. direct mail vs. PIF (Product Inbuilt Framework)
- SMS and phone call outreach during dunning period

Olga Rembielinska, Director Product Management, Billings & Payments
SYMANTEC

Kasia Sitkiewicz, Product Manager, Billings & Payments
SYMANTEC

3:05 – 3:25

Networking break

3:25 – 3:55

USE CASE: Reframing Decline-Recycling & Payments as a Marketing Strategy

What can subscription merchants do to hold onto the customers they've worked so hard to acquire? Hint: it's not by adding dollars to create content for your blog, your vlog or by increasing your social media spend. Scott Tivey, a 20 year veteran of designing subscription payments systems, will walk attendees through why investing in a payments strategy, which can in turn be used as a marketing strategy, can be a more effective route to retaining customers and increasing CLV. Scott will talk about the components of a unique payments strategy, including topics valuable to every subscription merchant: chargebacks, customer notification strategies, card type usage/acceptance/conversion, and dynamic retry logic.

Scott Tivey, Founder/CEO
CNP-SOLUTIONS, LLC

3:55 – 4:30

User Trust in the Age of Subscription and Today's Data Climate

We live in the golden age of data sharing and financial technology innovation. Extending payment options to power commerce has never been easier, however, consumer trust is dwindling and the need for privacy and control has become a regulatory concern in some markets. In this session, we'll explore the psychological, cultural, regulatory, and design factors impacting consumer confidence in payment products and explore successful strategies to bridge the trust gap. Key points:

- Understanding user trust: cultural and regulatory background in key markets
- Influence of design and communication practices on user trust and payment method adoption
- Impactful strategies to build user trust in subscription models

Carla Canino, Secure Payments Task Force, Data Protection Group Member
FEDERAL RESERVE SYSTEM
Consultant & Founder
SUNLIGHT COMMERCE CONSULTING

4:30 – 5:30

PRACTITIONERS' ROUNDTABLE: Risky Business—Fraud & Security in the New Recurring Payments Ecosystem

Recurring payments necessitate highly sensitive customer information to be stored electronically long-term. How can companies protect customer data and still minimize friction for users? How do companies determine their risk tolerance? And what happens to companies in the instance that customer data is continuously or excessively compromised? Listen to several leading payments practitioners discuss their strategies for mitigating risk while keeping customers' payment and billing experiences breezy and seamless.

Moderator:

Michelle Vautier, Head of Payments & Risk Product
PATREON

Panelists:

Bart Phelps, Senior Payments Manger
MAILCHIMP

Alan Bernstein, Senior Manager, Fraud Prevention & Payments Solutions
SHUTTERSTOCK

Charles Huang, Senior Product Manager
WEWORK

5:30 – 6:30

Cocktail Hour

Sponsored by:

GOCARDLESS

Past attendees to SUBCOM include:

Match	Roku	Book of the Month	Unbounce
LinkedIn	McAfee	Vinyl Me, Please	San Francisco Chronicle
Apple	Zipcar	Blue Bottle Coffee	Paul Larsen Consulting
Adobe	National Geographic	Stitch Fix	Peloton
Madison Reed	LifeLock	Politico	Pandora
Talkspace	Dog TV	Dow Jones	Spotify
Salesforce	Hulu	Ancestry.com	...and more!
Subscription Insider	HP Inc.	Grammarly	

Day Two July 31, 2018

8:30 – 9:00
Breakfast

9:00 – 10:00
PRACTITIONERS' ROUNDTABLE: Going Global—What Else Merchants Need to Know About International Expansion

On Day One we discussed several issues surrounding global expansion, including alternative payment methods as a way of optimizing the subscriber experience. But understanding alternative payment methods isn't just about providing choice—understanding alternative payment modes as they vary from country to country is absolutely essential for successful international expansion. Listen to several top practitioners and payments professionals discuss their experiences with going global, and the unique challenges they faced in different regions—both regulatory and cultural—and how they overcame them.

Moderator:

Alexander Appel, Chief of Staff
ALLPAGO

Panelists:

Carla Canino, Secure Payments Task Force, Data Protection Group Member
FEDERAL RESERVE SYSTEM
Consultant & Founder
SUNLIGHT COMMERCE CONSULTING

Jim Robinson, Business Development Manager, Global eCom
WORLDPAY

Monica Dabaghi, Sr. Manager, Product Management, Global Payments, Fraud, and Tax
SONY INTERACTIVE ENTERTAINMENT

Ofek Lavian, Product Manager, Payments
UBER

10:00 – 10:30
PLATINUM KEYNOTE: Let's Design a New Subscription Payment Method...

- If we were to design an optimal subscription payment solution from scratch, what would the key components be?
- How do existing payment methods map against this?
- What do we need to do in order to get to that optimal state?

Siamac Rezaiezadeh, Business Development, Global Accounts
GOCARDLESS

10:30 – 11:00
Networking & Coffee Break

11:00 – 11:40
Key Performance Indicators for Merchant and Payment Partner Performance

KPI's are at the heart of understanding merchant and payment partner performance, in addition to being the foundation in developing proactive actions for reducing costs and growing revenue. This session will examine some of the primary KPI's used in the industry, how calculations can vary by merchant and partner, why it's important to benchmark. Examples will be provided to highlight actionable insights for attendees.

Cyndi Hoddinott, Head of Global Payments
DROPBOX

Luke Salinas, SVP Strategy
ADYEN

11:40 – 12:15
USE CASE: Leveraging Machine Learning to Optimize Payments Success

Machine learning has already established itself as a powerhouse in Fintech, particularly in fraud management, but now there are other applications that are yielding promising results for merchants. Applications of machine learning in payments to be discussed include:

- Improving billing continuity
- Using behavioral clustering to effectively segment customers in order to improve testing and targeting
- Designing, testing, and optimizing communications approaches (best communications channels and call times)
- Identifying customers at risk of churning and acting quickly to retain them
- Improving predictability by identifying data anomalies in customer behavior and treating them as directed

And more!

Bill Rollinson, Sr. Product Manager, Cloud Digital Payments
ADOBE

12:15
Conference concludes

Boxed lunches will be available

About IEN

IEN is focused on producing practical, actionable, and content-driven events. We personally interview literally hundreds of people in each conference's topic area, discovering their on-the-job problems, issues and concerns. We then find the very best speakers to offer solution-driven content, as well as facilitating peer-to-peer networking at each event. Our events are not trade shows or expos, although we do offer partnership opportunities to select vendors. We're focused on the attendee's needs entirely.

Sponsorship and Exhibit Opportunities

Insight Exchange Network, LLC ("IEN") has a limited number of sponsorship opportunities in a variety of packages to help you get your message out to attendees. Sponsorship pricing is based on packages and start at low out-of-pocket. We can customize a variety of solutions to provide you with the best possible network opportunity.

For more information, contact **Corinne Smart at 704-649-3860 or email Corinne@insightxnetwork.com.**

Sponsors

DIAMOND SPONSOR:

Recurly

Recurly, Inc. delivers an enterprise-grade subscription management platform to thousands of businesses worldwide. Leading subscription businesses such as Sling Media, JibJab Media, Asana and HubSpot depend on Recurly's ability to cut through the complexity of subscription management to drive recurring revenue growth. Since its launch in 2010, Recurly has deployed subscription billing for thousands of companies in 32 countries, making it the most trusted pure-play provider of subscription management services. Recurly, Inc. is PCI-DSS Level 1, SAS 70 / SSAE 16 Compliant. For more information, visit **https://recurly.com**.

PLATINUM SPONSOR:

GOCARDLESS

The subscription economy demands a reliable and flexible recurring payment solution that helps maximize conversion whilst minimizing churn. GoCardless enable subscription businesses to easily connect to and collect recurring payments directly from their customers' bank accounts. With failure rates as low as 0.5%, we're helping companies to eliminate involuntary churn and maximize LTV. Our API and partner integrations make it simple to accept payments across the UK, Europe and Australasia and our transparent pricing structure means you are only charged for successful transactions, with no additional fees for set-up, failures or chargebacks. GoCardless powers recurring payments for over 30,000 merchants including some of the world's largest software and technology-driven companies like Box, TripAdvisor, SurveyMonkey and MindBody.

GOLD SPONSOR:

worldpay

Worldpay, Inc. (NYSE: WP; LSE: WPY) is a leading payments technology company with unique capability to power global, integrated omni-commerce. Worldpay processes over 40 billion transactions annually through more than 300 payment types across 146 countries and 126 currencies. With an unmatched technology platform and pre-built subscription billing integrations, Worldpay offers clients a comprehensive suite of products and services globally, delivered through a single provider. Worldpay, Inc. was formed in 2018 through the combination of the No. 1 merchant acquirers in the U.S. and the U.K. Worldpay, Inc. trades on the New York Stock Exchange as "WP" and the London Stock Exchange as "WPY."

SILVER SPONSOR:

Chargebee

Chargebee is the subscription management platform that powers the billing engines of 7000+ customers across 53 countries. Our plug and play, zero-code solution gives non-technical teams complete control over subscriptions and billing, while our powerful REST API offers developers the flexibility of customization. Chargebee integrates with essential business tools like Salesforce, Zendesk, Xero; and global payment gateways like Stripe, Braintree, PayPal and many others.

Partners

TOPSEOs
Independent Authority on Search Vendors

Visibility
The Magazine for Online Marketing Strategies

CrowdReviews
Buyers Guide Based On Client Reviews

Pricing

Rate	Early Bird: Before Jun. 29	Standard: After Jun.29
Standard	$1399	$1595
Non-Profit/Start-Up	$1199*	$1399*

*Requires IEN approval. Startups include companies that are three years old or younger, with less than $500,000 in revenue.

TEAM DISCOUNTS

- Three Delegates will receive a **10% DISCOUNT**
- Four Delegates will receive a **15% DISCOUNT**
- Five Delegates or More will receive a **20% DISCOUNT**

Please call **Rebecca Davis** to make your group reservation at **501-904-5716** or email **Rebecca@insightxnetwork.com.**
Refunds and Cancellations: For information on refunds and cancellations please visit our website: www.insightxnetwork.com.

Venue

Marines' Memorial Club & Hotel
609 Sutter Street
San Francisco, CA 94102
(415) 673-6672
www.marineclub.com

Standard Rooms: $239
Deluxe Rooms: $269

Call Marines' Memorial for availability at (415) 673-6672.

ABOUT THE MARINE'S MEMORIAL CLUB & HOTEL

Dedicated as a living memorial to the U.S. Marines who served in the Pacific during World War II, Marines' Memorial Club & Hotel is a leader in San Francisco Union Square hotels. A landmark since 1946, the hotel is located close to a bustling theater district in the heart of the city. Blending traditional décor and modern comforts, our classic 1920's California Spanish Revival hotel offers an inviting atmosphere that is rich with history, honor and pride.

Reserve before July 2, 2018 to receive this special rate and mention Insight Exchange Network July 2018. Please be aware that these rooms are first come, first served and may fill up quickly.