

**THUN
DER
HEAD
COM**

INNOVATE



INNOVATE 2013

October 28th to 30th, 2013
Renaissance Austin Hotel
Austin, Texas



WELCOME TO INNOVATE 2013 IN AUSTIN, TEXAS!



If it's your first trip to Austin, be sure to take a tour of the city while you're here and enjoy the music, warmth, and hospitality that make the capital of Texas so famous.

Here at the conference, we'll keep you engaged with opportunities to learn, network, and exchange ideas. This year, Innovate features a great lineup of guest speakers, keynote presentations from industry experts, breakout sessions with your peers, and unique insight into our roadmap for customer engagement. We'll do our best to make sure that every moment of your time at Innovate 2013 is well spent.

This conference wouldn't be possible without our friends at Guidewire, whose generous sponsorship helps us bring this event to you free of charge. Learn more about Guidewire on page 11 of this guide.

Finally, I'd like to thank you, our customers and guests. You're the reason we're here. Everyone at Thunderhead.com is passionate about making all of our customers successful. While you're here at Innovate 2013, please don't hesitate to tell me how we can make your experience with us even better.

Sincerely,

Darshan Chandarana
Vice President, Product and Industry Marketing

CONFERENCE OVERVIEW

SEE WHAT'S NEW IN THUNDERHEAD.COM ONE

The revolutionary Thunderhead.com ONE™ Engagement Cloud™ combines the rich communication management capabilities you expect from Thunderhead.com with the power, scalability, and flexibility of the cloud. Thunderhead.com delivers a true SaaS offering for enterprise customer experience and customer engagement.

LEARN MORE ABOUT NEW SOLUTIONS

Engage with experts and other community members about enhancing your experience with NOW and augmenting your existing platform with new capabilities in ONE Engagement Cloud:

- Deliver enriched, personalized experiences
- Enable customer engagement with Salesforce
- Manage customer relationships beyond channels
- Multiply the impact of your existing IT investments

EXCHANGE BEST PRACTICES

Discuss the changing world of customer experience management and enterprise engagement with peers and industry experts. Find out how your peers are taking advantage of Thunderhead.com solutions to transform the experience they deliver to their customers.

NETWORK WITH COLLEAGUES

We've listened to your feedback and built in ample time to network with fellow attendees and members of the Thunderhead.com community in this relaxing and inviting setting. We will also find time to enjoy the lively atmosphere and hospitality Austin is known for.

AGENDA AT A GLANCE

PRE-CONFERENCE: MONDAY, OCTOBER 28TH

6:30 – 8:00 PM Welcome Cocktail Reception

DAY ONE: TUESDAY, OCTOBER 29TH

8:00 – 9:00 AM Registration and breakfast
 9:00 – 10:45 AM Welcome to Innovate 2013, Keynote Presentation
 10:45 – 11:15 AM Networking Break
 11:15 – 12:45 PM General Session
 12:45 – 1:45 PM Lunch
 1:45 – 3:45 PM General Session
 3:45 – 4:00 PM Break
 4:00 – 5:45 PM General Session
 5:45 – 6:00 PM Day One Summary and Close
 6:15 – 6:35 PM Departure from Hotel for Customer Appreciation Dinner & Entertainment

DAY TWO: WEDNESDAY, OCTOBER 30TH

8:00 – 9:00 AM Breakfast
 9:00 – 9:15 AM Day Two Opening Keynote
 9:15 – 10:30 AM General Session
 10:30 – 11:00 AM Networking Break
 11:00 – 12:30 PM General Session
 12:30 – 12:45 PM Closing Keynote
 12:45 – 2:00 PM Lunch

AGENDA

Preconference

Monday, October 28th

6:30 – 8:00

Welcome Cocktail Reception

Renaissance Austin Hotel

Enjoy your first night in Austin by joining the Thunderhead.com team by the pool for our relaxed and entertaining welcome cocktail reception. It's the perfect way to meet new members of the Thunderhead.com community, catch up with those you haven't had the opportunity to see in a while, and of course, kick-off Innovate 2013.

Day One

Tuesday, October 29th

8:00 – 9:00

Registration and breakfast

9:00 – 9:15

Darshan Chandarana, VP Product Marketing & Industry Solutions, Thunderhead.com

Welcome to Innovate 2013

Darshan sets the stage for time together, shares an update on the growth of our business and the benefits you can continue to expect from Thunderhead.com

9:15 – 9:30

Marchai Bruchey, Chief Customer Officer, Thunderhead.com

The Journey to Transform

Marchai shares Thunderhead.com's view on the importance of customer experience and what it means for our customers. Learn more about the initiatives we are undertaking to drive improved engagement with Thunderhead.com.

9:30 – 10:30

Kerry Bodine, VP, Principal Analyst serving Customer Experience, Forrester Research

Keynote Presentation: Kerry Bodine, Forrester Research

Forrester Principal analyst and Vice President Kerry Bodine is the co-author of *Outside In: The Power of Putting Customers at the Center of Your Business*. Kerry leads Forrester's research on customer experience design and innovation. She taps into her past work as both a design practitioner and leader to help Forrester clients develop empathy for customer needs, and co-create experiences that truly matter — for their customers, for their employees, and for their business. She's also the creative force behind the customer experience ecosystem, a framework that helps companies diagnose and fix customer problems at their roots.

10:30 – 10:45

Moderated by **Marchai Bruchey**, Chief Customer Officer, Thunderhead.com

Q&A session with Kerry Bodine

10:45 – 11:15

Networking Break

11:15 – 12:00

Darshan Chandarana, VP Product Marketing & Industry Solutions, Thunderhead.com

State of Cloud Computing

The constant evolution in computing has helped businesses to innovate and automate providing a competitive advantage in the global marketplace. With the rise of the Cloud, organizations are at a crossroads of technology. Early adoption of the Cloud can provide organizations with an opportunity to transform their business models and gain a competitive edge. While cost reduction is one of the benefits, several other benefits accrue to organizations. In this session, we will look at why the Cloud will change the face of your organization, what other benefits you'll see once adopting the Cloud and why adoption of this computing model is enabling its various stakeholders including customers, business partners, suppliers, etc. to connect and do business more seamlessly.

AGENDA

12:00 – 12:45

Ray Gerber, Chief Technology Officer, Thunderhead.com

Innovation at Thunderhead.com

Leveraging innovation to deliver market-leading solutions that enable organizations to build stronger and more valuable customer relationships through superior omni-channel interactions that are relevant, consistent and appropriate. Thunderhead.com's success in Customer Communications Management (CCM) market was based on disruptive innovation, creating a new generation of solutions that eclipsed the functionality of the incumbent vendors in that market. Now, customer and market expectations are changing rapidly with the proliferation of touchpoints and the increasing importance of context. Communications need to evolve to become more conversational and move beyond isolated interactions in order to maximize the value of continuously connected customers and create long-term engagement. Again, Thunderhead.com with our Engagement Cloud™ is rising to the challenge, with innovative new solutions that will enable our customers to build competitive advantage through superior customer engagement, and insanely great customer experiences at all touchpoints.

12:45 – 1:45

1:45 – 2:15

Geoff Niven, VP Product Management, Thunderhead.com

Lunch

NOW Feature overview & Roadmap

This session will introduce the NOW version 6.0 major release and provide an overview of its capabilities and supported platforms. The session will focus on the new capabilities for Correspond & Review NOW customers, together with a review of some of the latest features in the FOP engine. It will conclude with a glimpse into the future with a look at some of the roadmap features for NOW beyond version 6.0.

2:15 – 2:45

Geoff Niven, VP Product Management, Thunderhead.com

ONE Communicate Overview

This session will provide an introduction to ONE Communicate describing the business use cases that it is well suited to handle today, and also include a brief demonstration. It will also look to the future of the solution and provide insight into how the solution will take on the bulk delivery use case using Thunderhead.com's revolutionary cloud technology. Overall the session aims to be very valuable to anyone looking to take their document applications to a more cost-effective cloud model in the next three years.

2:45 – 3:15

Martin Davey, EVP Industry Solutions, Thunderhead.com

ONE Correspond for Salesforce

This session will provide an introduction to the Salesforce App – ONE Correspond for Salesforce. It will describe how ONE Correspond can help users leverage Salesforce data to produce highly personalized, on-brand, personalized sales and service documents quickly and easily within the Salesforce environment. The session will include a demo and a brief outline of the roadmap.

3:15 – 3:45

Martin Davey, EVP Industry Solutions, Thunderhead.com

ONE Collaborate

This session will provide an introduction to our latest solution – ONE Collaborate. This tool empowers external partners, teams, and customers to engage in document collaboration with an emphasis on secure multi-party negotiation of data-driven agreements and contracts. The session will include a demo and a brief outline of the roadmap.

3:45 – 4:00

Break

4:00 – 4:45

Marc Plant, EVP Customer Success Services, Thunderhead.com

Migrating to the Cloud

In this presentation we will look at the process of migrating your existing NOW applications and resources to the Thunderhead.com ONE Engagement Cloud solution. We will cover the upward compatibility of NOW resources to ONE as well as reviewing the differences between API calls for external integrated systems. In addition we will also consider the benefits of a "hybrid" solution combining the delivery of an existing NOW solution with the powerful capabilities of the Thunderhead.com ONE Collaborate offering, including a demonstration of NOW generated documents being passed into the Cloud for collaboration and then returned to NOW for final fulfilment.

AGENDA

4:45 – 5:45

Hosted by **Rodney Frye**, VP Sales, North America, Thunderhead.com

5:45 – 6:00

6:15 – 6:35

DAY ONE (continued)

Customer Viewpoints

Views and insights from fellow Thunderhead.com customers, followed by an interactive Q&A session.

Day One Summary and Close

Departure from the Hotel

Customer Appreciation Dinner and Entertainment

Being in Austin, Innovate 2013 is sure to include some musical entertainment; we certainly couldn't come to Austin and not take part in the famous Austin music scene.

Day Two

Wednesday, October 30th

8:00 – 9:00

9:00 – 9:15

Darshan Chandarana, VP Product Marketing & Industry Solutions, Thunderhead.com

9:15 – 9:45

Matt Adams, Executive Creative Director, User Experience, Thunderhead.com

9:45 – 10:30

Chad Ashcraft, Customer Experience Solutions, Thunderhead.com

10:30 – 11:00

11:00 – 11:45

David DeWald, Community Manager, Thunderhead.com

11:45 – 12:30

Marc Plant, EVP, Customer Success Services, Thunderhead.com

12:30 – 12:45

Darshan Chandarana, VP Product Marketing & Industry Solutions, Thunderhead.com

12:45 – 2:00

2:00

Breakfast

Day Two Opening Keynote

Darshan talks with our audience about our continued commitment to enhancing your experience with Thunderhead.com

Usability at Thunderhead.com

Our goal as a design-led organization is to empower the users of our products to become champions of their domains. Yes, it's kind of a tall order. Reaching this goal always starts with building strong and lasting relationships with our users. For example, did you know that our every one of our innovative solutions has been a result of these relationships? It's true. We're always listening for the next problem to solve. Come for a crash course in how we use visual communication, crucial conversations, and collaborative design sessions to create and constantly improve the products you use.

ONE Connect

This session will provide an introduction to ONE Connect describing the business challenges that we approach and the positive customer engagement that results in what is an increasingly complex and bespoke omni-touchpoint landscape. It will include a short demonstration illustrating the customer journey across these touchpoints and the highly contextual and relevant experience that is achievable today.

Networking Break

Panel Discussion "Your Community"

A demonstration of new features and discussion with members of the Thunderhead.com customer community about working groups, what makes for a great community member, and how you can get involved.

Tips for Extending your Use

In this session we will look at tips and techniques for extending your use of the Thunderhead.com NOW solution. This will delve into areas such as Branding, PDF Bookmarks, QR Codes, and Clickable Images & Hyperlinks. We will also review the benefits of Overlay Forms (Providing complex forms support with data field overlay) and Resource Categories (intelligent management of resource metadata) to provide powerful dynamic and easy to maintain solutions.

Closing Keynote

A discussion focused on practical application of Thunderhead.com Solutions with our Services Team

Lunch

Close

SPEAKERS



Matt Adams, Executive Creative Director, User Experience, Thunderhead.com

As a creative facilitator and visual consultant, Matt Adams works closely with the sharpest minds and visionaries at Thunderhead.com in developing strategic thinking into product that delights. Matt is an important member of our User Experience team, where he helps to drive a cycle of constant assessment and improvement in the visual language, voice, and interaction patterns for our entire suite of solutions. Matt joined Thunderhead.com from the global visual consulting firm, XPLANE where he acted as Creative Director and Studio Manager, leading teams in experience design, communication programs, and blended learning systems.



Chad Ashcraft, Customer Experience Solutions – North America, Sales, Thunderhead.com

Chad Ashcraft is the Director of Customer Experience Solutions responsible for business development and execution of the go-to-market strategy in North America for the ONE Connect product. For the majority of his career, Chad has focused on optimizing customer engagement for large enterprises with highly contextual and relevant experiences through the application of data, analytics, and behavior-driven interaction strategies. Prior to his role at Thunderhead.com, Chad was a co-founder at Toovio Software, which brought to market the first cloud-based real-time decisioning solution built for marketers.



Kerry Bodine, Vice President and Principal Analyst, Forrester Research

In addition to her role at Forrester, Kerry Bodine is the coauthor of *Outside In: The Power of Putting Customers at the Center of Your Business*. Kerry leads Forrester's research on customer experience design and innovation. She taps into her past work as both a design practitioner and leader to help Forrester clients develop empathy for customer needs and co-create experiences that truly matter – for their customers, for their employees, and for their business. Kerry's research, analysis, and opinions appear frequently on sites like Harvard Business Review, The Wall Street Journal, Fast Company, Forbes, USA Today, and Advertising Age.



Marchai Bruchey, Chief Customer Officer, Thunderhead.com

As the Chief Customer Officer at Thunderhead.com, Marchai is responsible for customer experience, acquisition, retention, and success: bringing the voice of the customer to the boardroom table. Marchai has more than 30 years of experience in sales, marketing and strategic alliance management in the technology industry. She came to Thunderhead.com from Chordiant Software where she served as Senior Vice President & Chief Marketing Officer. Previously, she spent more than 10 years at KANA Software, a leading provider of customer service solutions.



Darshan Chandarana, Vice President Product Marketing and Industry Solutions, Thunderhead.com

Darshan Chandarana is the Vice President of Product and Industry Solutions Marketing. Previously with Salesforce.com, Darshan brings strong industry expertise to elevate and drive strategic growth as Thunderhead.com redefines the customer experience and enterprise engagement market. At Salesforce.com, Darshan was the global lead for Financial Services Strategy & Solutions and led the financial services solution team on transformational projects in banking, insurance, and capital markets. Prior to that, he worked in a similar capacity at Oracle.



Martin Davey, Executive Vice President Industry Solutions, Thunderhead.com

Martin Davey is responsible for directing Thunderhead.com's development efforts with a clear focus on industry-specific solutions. Martin is a founding member of the Thunderhead.com team, fulfilling the role of CTO between 2006 and 2011. With more than 20 years of IT experience, he spent his early career architecting leading-edge solutions for the financial services industry, where he held IT leadership roles at both Aetna Life and Equitable Life. Martin then transitioned to commercial software development, originally working for INSCI (now ClearStory Systems) as a solution architect and then for Xenos Inc, where he was responsible for leading the UK development team.



David DeWald, Community Manager, Thunderhead.com

David DeWald has been active in online community management for the last fifteen years with a focus on knowledge management, creating positive customer experiences, and building brand loyalty. Prior to joining Thunderhead.com, David worked at Software Quality Engineering where he was project manager for TechWell.com. He has also worked in the video game industry, managing communities with members numbering in the millions.



Rodney Frye, Vice President Sales, North America, Thunderhead.com

Rodney Frye is Vice President, Sales for Thunderhead.com and is located in the Dallas, Texas area. He is quite at home in Austin, having earned his BBA from the University of Texas at Austin. Rodney is responsible for expanding Thunderhead.com operations in North America, specifically to the insurance, financial services, and government markets (both State and Federal). Since 1987, Rodney has worked with companies to provide Customer Experience Management and Customer Communication solutions. His success at Thunderhead.com comes from creating fast-paced, agile environments that empower employees.



Ray Gerber, Chief Technology Officer, Thunderhead.com

Ray Gerber delivers innovative, leading solutions in Thunderhead.com's current markets and beyond, to maintain and develop our reputation as a disruptive technology company. As a strong leader with 30 years of experience, Ray builds technology strategies that allow organizations to maximize the reuse of corporate assets to build new and innovative technologies. Ray's specialties include customer experience technologies, business process management, customer relationship management, marketing and sales automation, and enterprise resource planning. His previous technology leadership experience includes positions at Chordiant Software, FirstSecond Technologies, and PegaSystems.



Dean Heckman, Principal Solution Architect, Thunderhead.com

Dean Heckman is Principal Solution Architect for Thunderhead.com, leading the North American Insurance & Healthcare Presales Team. His keen ability to listen, understand, and then recommend solutions to a client's business challenges have led to many successful Thunderhead.com deployments and very satisfied Thunderhead.com customers. He has been helping organizations deploy customer engagement solutions for nearly 30 years, starting his career with Xerox Corporation, then moving into the vendor community to help organizations with multi-channel, e-delivery, and real-time business modernization programs.



Laura Hooten, Associate Solution Architect, Thunderhead.com

Laura Hooten is an Associate Solution Architect focusing on the ONE Correspond for Salesforce solution. She has an innate ability to address the technical capabilities of the solution, while at the same time demonstrating the business value it presents for customers. With a background in data integration, Laura has worked with Salesforce.com as a common endpoint for data exchange and has extensive experience nurturing customer relationships by providing technical assistance and resources needed to achieve successful implementations.



Linda Koutras, Senior Vice President Information Technology, Primerica, Inc.

Linda Koutras joined Primerica in 1980 and became an officer managing application programming in 2001. Linda has thirty-three years of extensive life insurance business knowledge, earning a designation as Fellow, Life Management Institute in 1987. She also has extensive technical knowledge of mainframe and distributed systems. She currently manages the Life Administration, Image, Customer Communication and ISA Support Systems for Primerica.



Collin Lampman, Director, Solution Architecture, N.A, Thunderhead.com

Collin Lampman leads the North American Thunderhead.com presales team and has been connecting customers with enterprise software solutions for nearly 15 years. His work has included focus on insurance, financial services, and government. Prior to his seven years with Thunderhead.com he provided presales support for enterprise content and business process management solutions with IBM FileNet, as well as hardware solutions with Unisys.



Brian Lee, Senior Solution Architect, Thunderhead.com

Brian Lee has spent the past 10 years in various technology roles as a developer, business analyst, project manager, consultant, and sales engineer. Currently, Brian is a Sr. Solutions Architect and is responsible for solution sales across all industry verticals for Thunderhead.com. Brian's ability to understand and analyze sophisticated business processes has resulted in many successful Thunderhead.com implementations. Prior to joining the sales team, Brian was part of the Customer Success Services team as a consultant working on large-scale implementations.



Leslie Mathis, Associate Vice President Life Operations, Primerica, Inc.

Leslie Mathis joined Primerica in 2002 as an analyst in information technology. Leslie helped start up the Office of Supervisory Jurisdiction Department in 2003 and the Grow the Sales Force Department in 2005. Leslie moved to Life Operations in 2008. She currently manages the Life projects for New Business, Underwriting, Policy Owner Services, Image Technology and Letter Writer. Leslie graduated Cum Laude from Auburn University in 2002 with a Bachelor's Degree in Business.



Geoff Niven, Vice President Product Management, Thunderhead.com

Geoffrey Niven is a cofounder of Thunderhead.com and is responsible for product management for the Thunderhead.com NOW solution and the SaaS-based Communications Capability of the ONE Engagement Cloud. He has over twenty years experience working in the vendor-side customer experience management market, helping blue-chip organizations improve their customer communications over all customer touchpoints, including print, email, and mobile channels, and helping them to migrate to the emerging world of SaaS. Geoff founded Thunderhead.com with Glen Manchester in 2001.



Marc Plant, Executive Vice President Customer Success Services, Thunderhead.com

Marc Plant has over 30 years of experience in the IT industry, holding a number of managerial positions in both development and consulting. He is a cofounder of Thunderhead.com and has grown the Thunderhead.com Customer Success Services department from inception to a \$15 Million annual practice with a first-class team of consultants and trainers across three continents.



Phil Rowlinson, Vice President Global Sales Operations, Stylesight Inc.

Phil Rowlinson is passionate about helping sales teams succeed and has increased the effectiveness of over 800 sales professionals across a number of global technology companies, focusing on three core areas: management and control, sales enablement, and pipeline growth and velocity. An engineer from the UK specializing in process and systems, Phil now adapts that experience to Stylesight, an innovative and creative company headquartered in New York. He has also made a significant contribution to sales performance at companies such as Intralinks and Bentley Systems.



EXPLORING AUSTIN

Be sure to experience Austin's historic districts, shopping, wineries, and much more.

Downtown Austin: Downtown Austin offers a variety of things to do for everyone. There is an endless list of restaurants, bars, music, museums and entertainment for everyone to enjoy.

Historic Sixth Street: Sixth Street is a historic street and entertainment district in Austin, Texas. It is located within the city's urban core in Downtown Austin. Sixth Street (formerly known as Pecan Street) is lined with many historical houses and commercial buildings dating from the late 1800's and early 1900's. The storied old buildings now house numerous bars, a host of live entertainment venues, cafes, and restaurants. Live music of every genre abounds. Great food is also a staple on Sixth Street, featuring such regional staples as chili, ribs, and Tex-Mex plus steak, seafood, Cajun-cooking, and deli.

Texas Capitol: The Texas State Capitol is the oldest surviving state office structure and a great place to learn about Texas history and the Texas Legislature. Free tours are available daily: Monday through Friday 8:30 am – 4:30 pm, Saturdays from 9:30 am – 3:30 pm, and Sundays from Noon – 3:30 pm.

Lake Travis: Lake Travis is probably the most visited of the Highland Lakes because of its proximity to Austin, TX. Its location and size make it a popular destination for aquatic sport enthusiasts, including boating, fishing, swimming and even scuba diving. Lake Travis is perfect for those seeking a more active environment and plenty to do, including waterside dining and plenty of activities as well as easy access to the Austin amenities.

Museums: Austin offers many free museums. Learn about History, Culture, Music, and Art! This is a fun activity for families to experience, explore and enjoy at no cost.

The Domain: Thanks to the incomparable cuisine, diverse local artists, and eclectic shopping, Austin is known as one of the most unique destinations in the country. The Domain is bringing the best of Austin to one single, urban location. The Domain offers impeccable restaurants and luxury shops as well as keeps up with the Austin spirit.

Zilker Park: This 351 acre park is home to a variety of recreation opportunities and special events.



Taniguchi Japanese garden in Zilker Park

*For more information, contact Renaissance Austin's knowledgeable concierge to seek recommendations or book activities, dining or entertainment reservations.



*Deliver insurance
your way.*

Guidewire builds software products that help Property/Casualty insurers replace their legacy core systems and transform their business. Designed to be flexible and scalable, Guidewire products enable insurers to deliver excellent service, increase market share and lower operating costs. Guidewire InsuranceSuite™ provides the core systems used by insurers as operational systems of record. Additional products provide support for data management, business intelligence, anytime/anywhere access and guidance and monitoring. More than 150 Property/Casualty insurers around the world have selected Guidewire. For more information, please visit www.guidewire.com.

ABOUT THUNDERHEAD.COM

Thunderhead.com is a global provider of customer experience and enterprise engagement solutions. Thunderhead.com's ONE Engagement Cloud™ provides a powerful suite of SaaS solutions that gives businesses the ability to communicate, collaborate and have real-time conversations with their customers and partners across all touch points throughout their journey. The result is that businesses have more power to drive revenue, brand strength, and differentiation by delivering far beyond isolated interactions and experiences but by creating the rich relationships that great businesses are built on. Thunderhead.com serves its global customer base from offices located in North America, Europe and Asia Pacific. Learn more at www.thunderhead.com

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