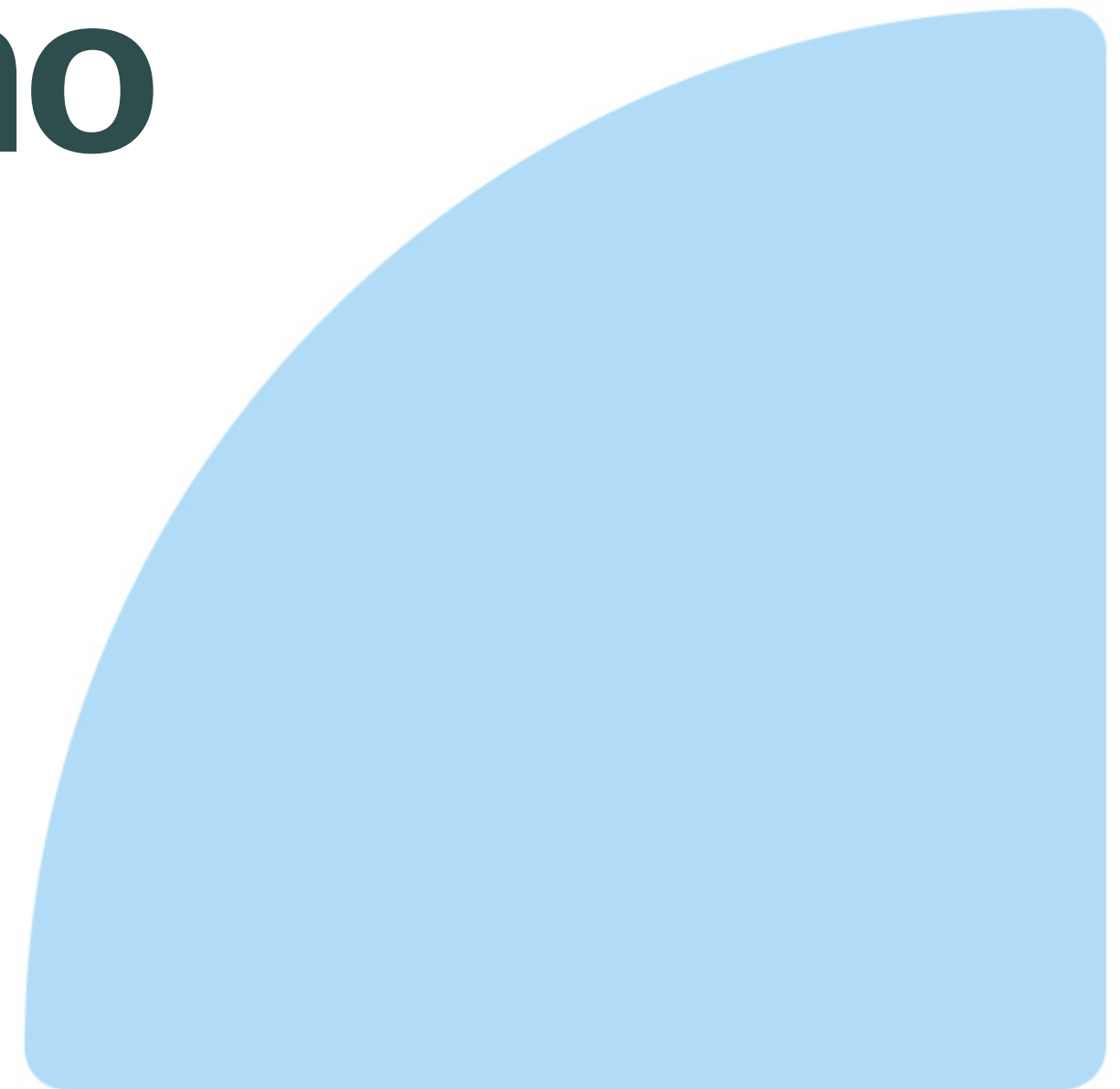


CIO 101: Product Demo and Overview

May 2026



YOUR FACILITATORS



Kate Fisher

Sr. Customer Success Specialist
LCvista



Stef Dennis

Customer Success Specialist
LCvista



Yuri Lopez

***Product Training and
Enablement Specialist***
LCvista

Monthly Support Office Hours

A space where you can ask questions, get **quick answers**, and learn **helpful fixes**, with optional breakout spaces for further support. We have LCvista experts present to answer your questions, ranging from **Support, Compliance, Content Management, and Conferences i/o.**

Every **last Wednesday** of each month (just about)!

Sign-up on LCvista Academy!

CIO Panel: Best Practices for Onboarding New Users

CIO Panel: Best Practices for Onboarding New Users

Join a panel discussion focused on onboarding new users in Conferences i/o. We'll share practical strategies, lessons learned, and real-world approaches to help you set users up for success from the start.

[Enroll Now](#)

Date: Tue, 5/26/26

Time: 8am PT/11am ET

Program ID: 4000063

Session Agenda

CIO 101: Product Demo
and Overview



Intro and Background Overview



Interactive Demo



Game



Q&A

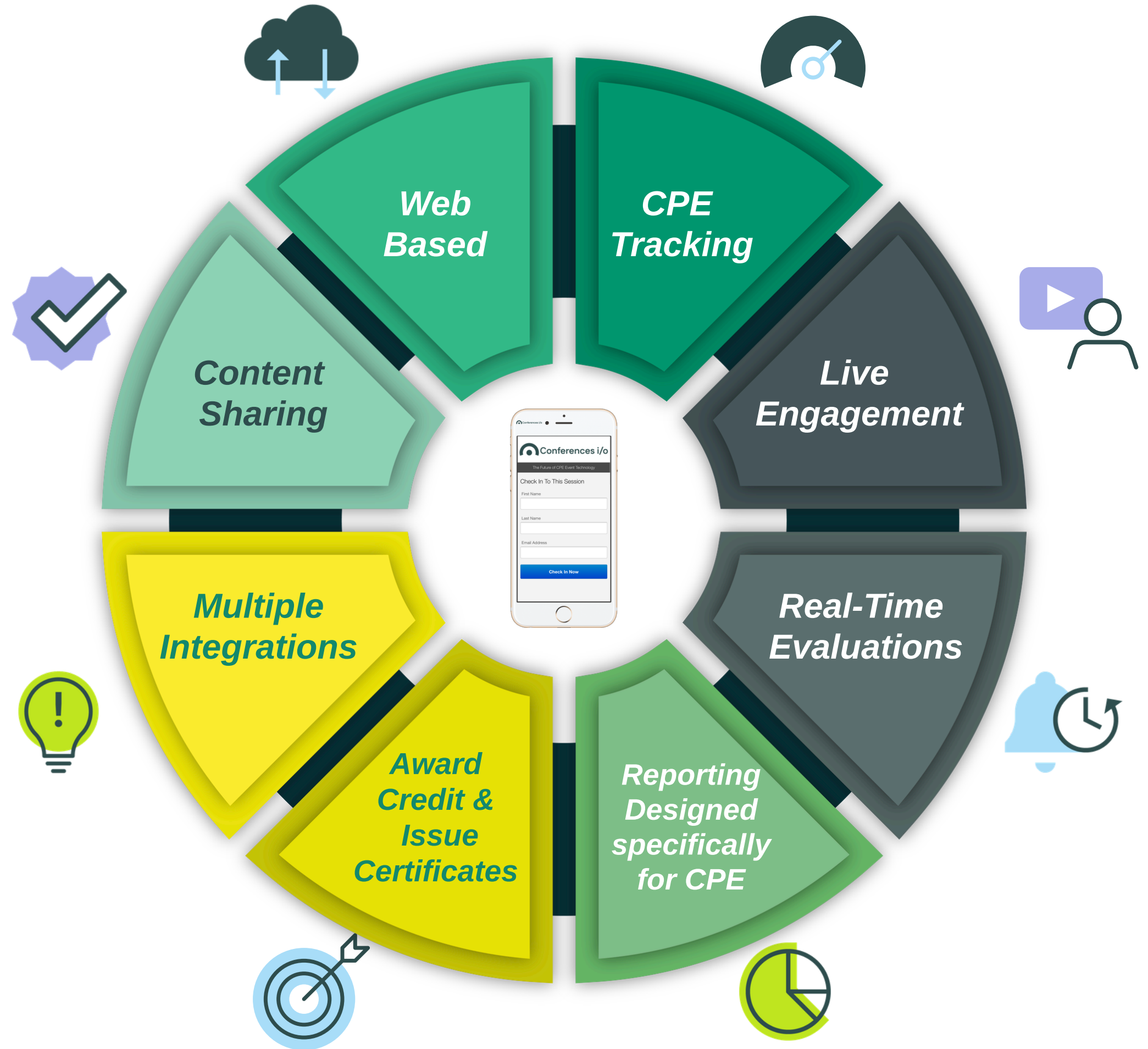


Closing

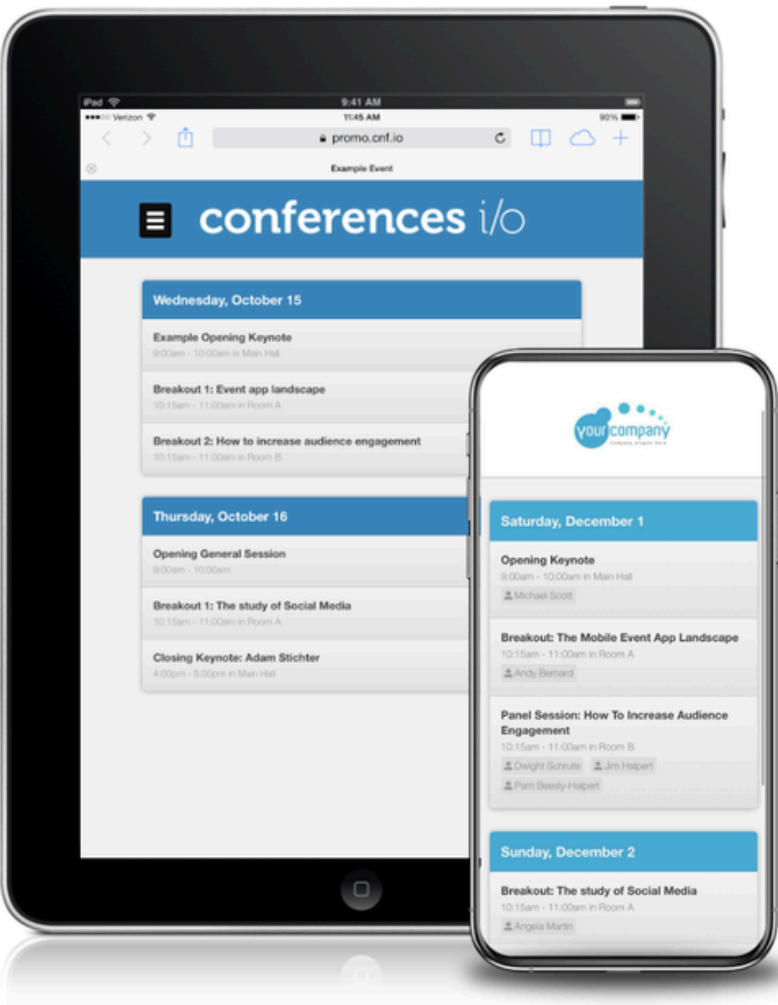
Product Overview



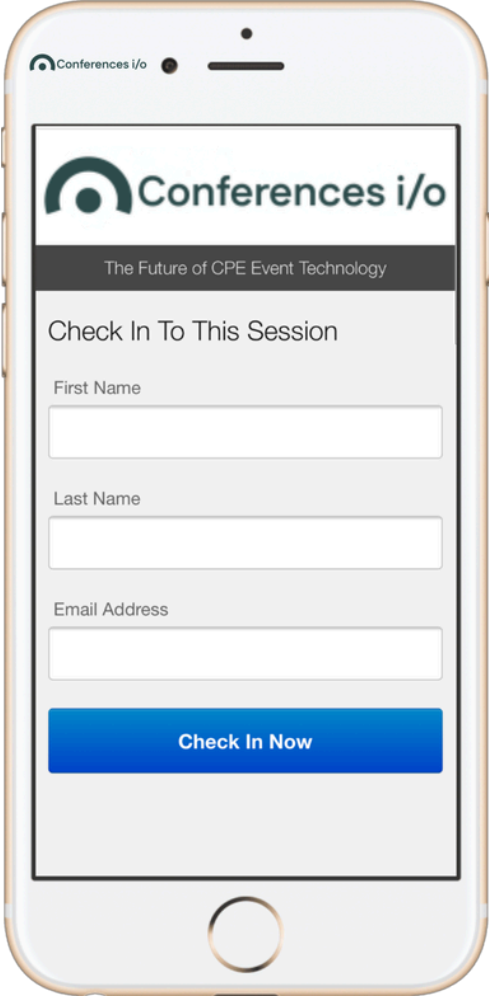
Product Overview



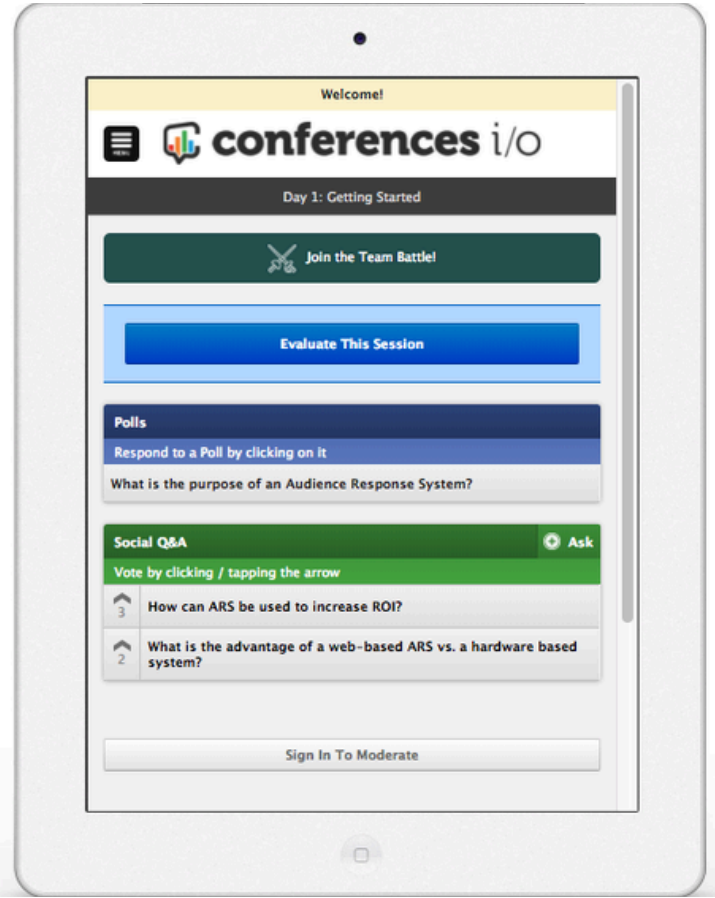
Your Workflow



Web Based



Participant
Check-in



Engage
Your
Audience



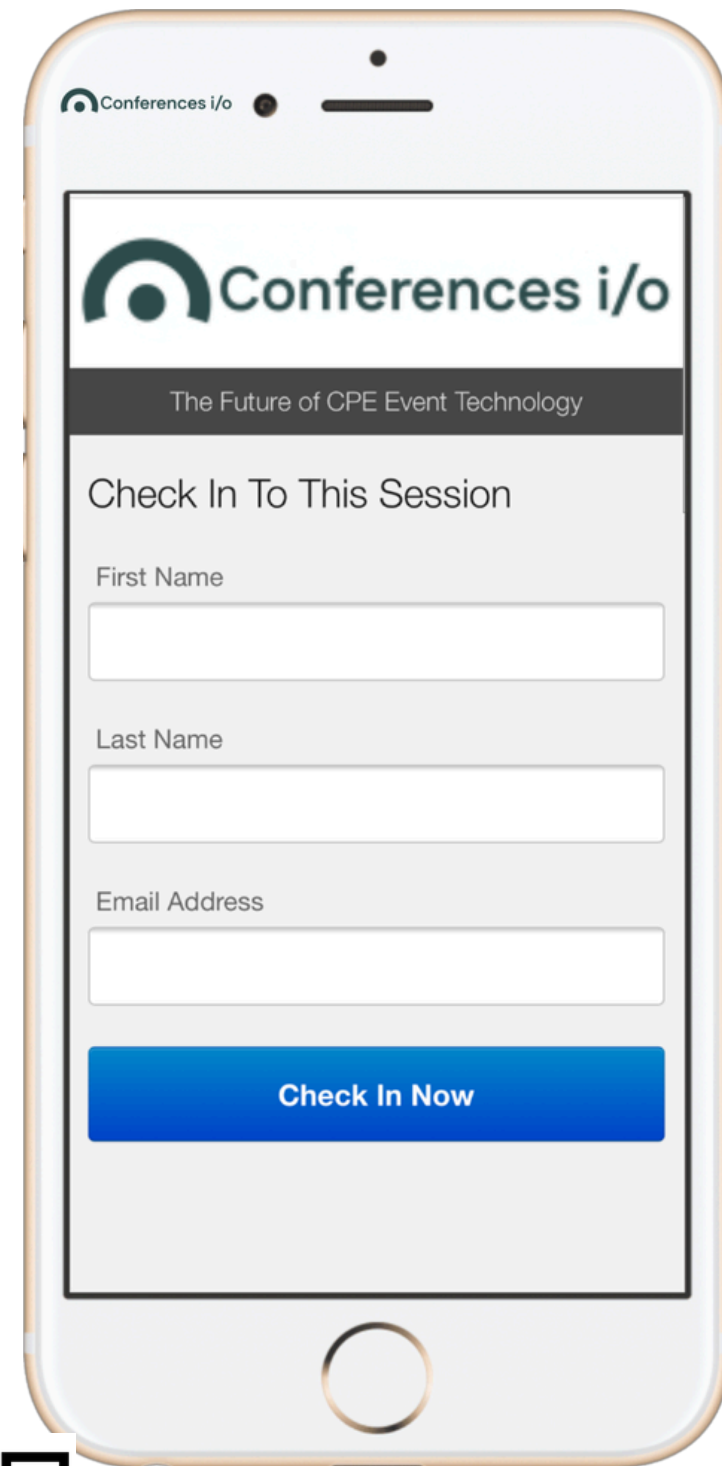
Certificates
&
Reporting

KATE.CNF.IO

- Navigate to <https://kate.cnf.io/> and tap the session titled "CIO Product Demo & Overview"
- OR just point your phone's camera at the QR code to join directly



How to Participate



Conferences i/o

The Future of CPE Event Technology

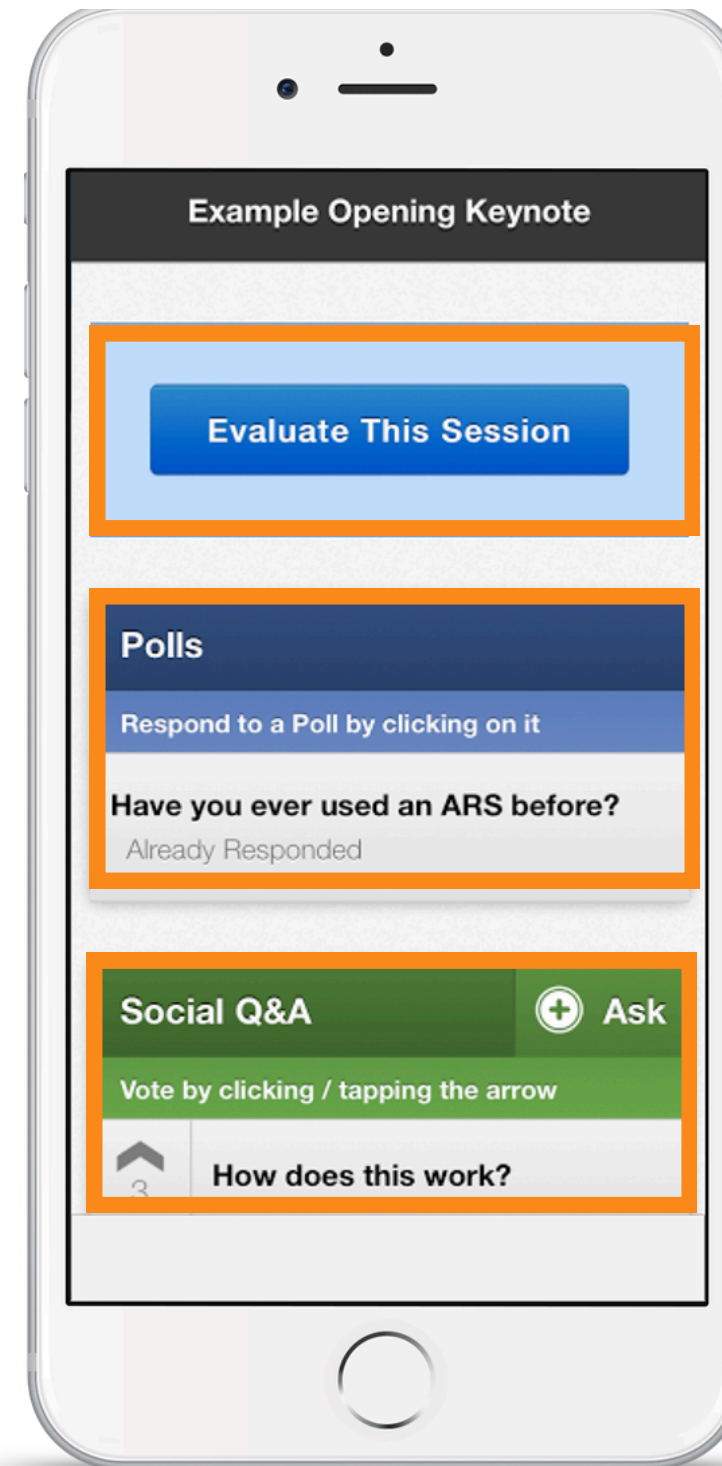
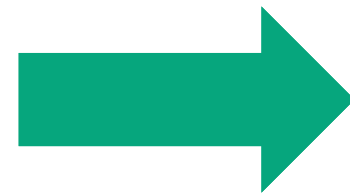
Check In To This Session

First Name

Last Name

Email Address

Check In Now



Example Opening Keynote

Evaluate This Session

Polls

Respond to a Poll by clicking on it

Have you ever used an ARS before?

Already Responded

Social Q&A

Vote by clicking / tapping the arrow

How does this work?

- Web-based login from any device
- Simple attendee check-in
- Live polls, Q&A, and evaluations
- Real-time event engagement
- No app download required



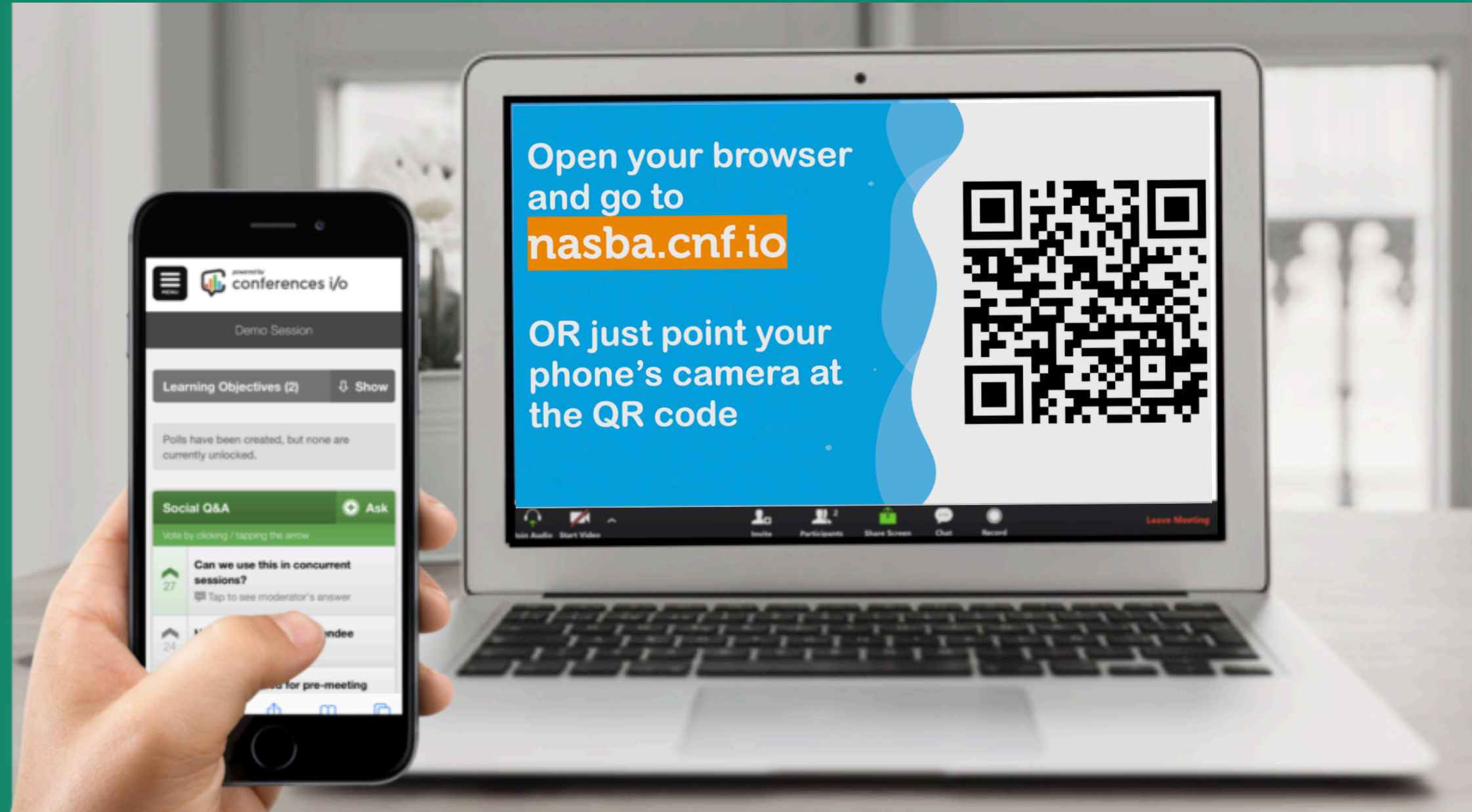
Web Based

Sign-in Process

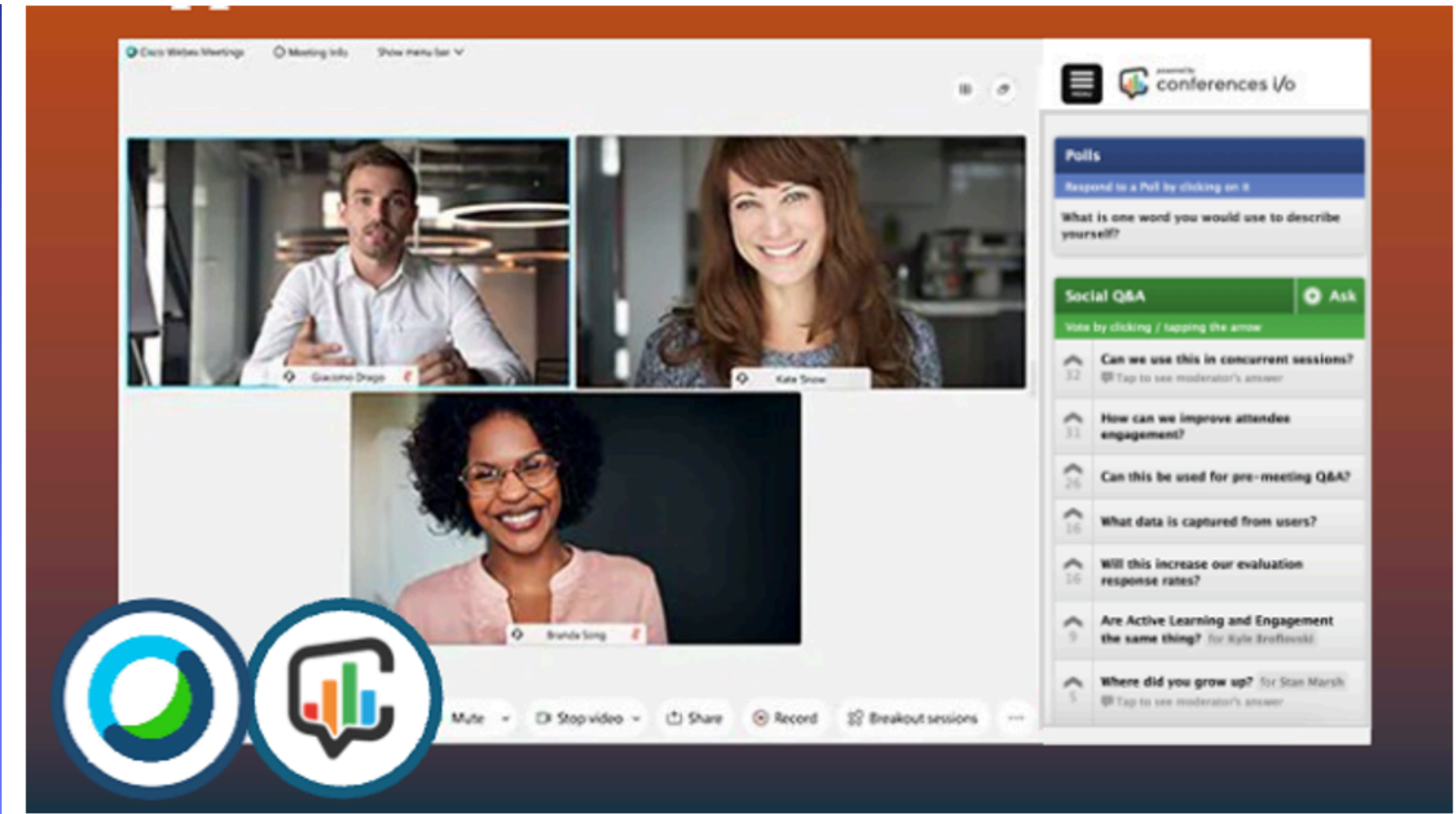
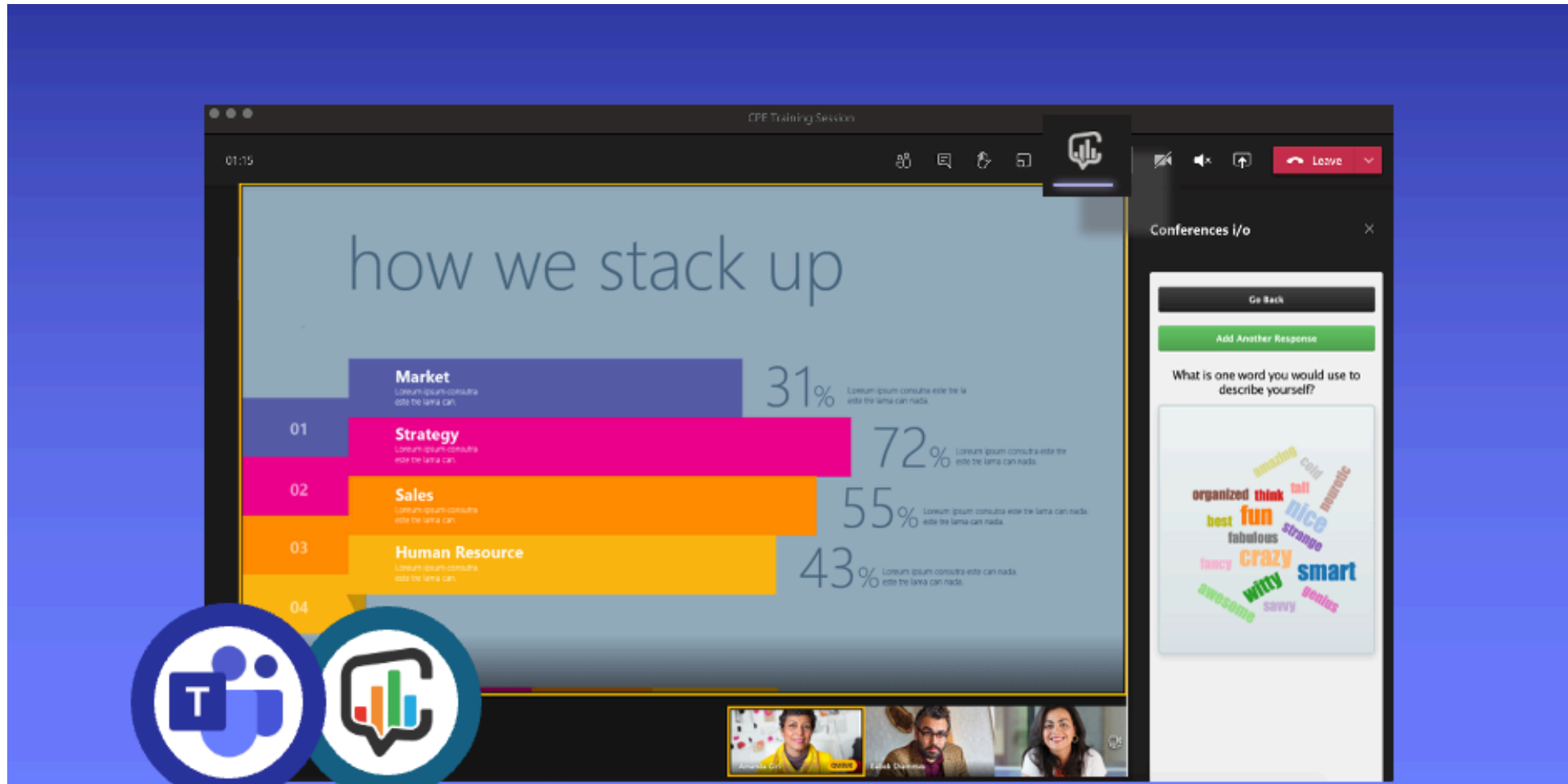


Web Based Log-in

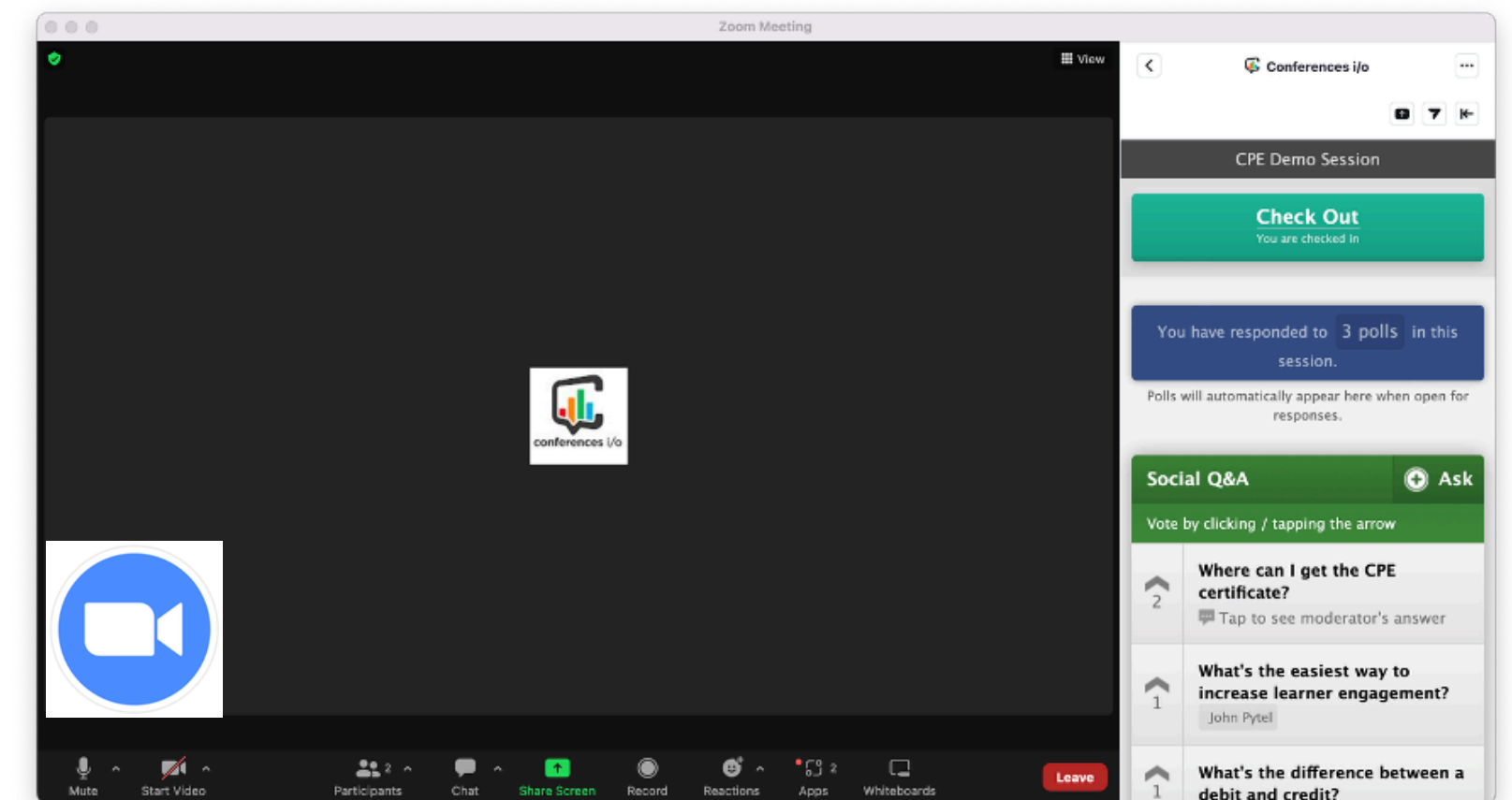
- Nothing to download
- Custom URL
- QR Code
- Launch:
 - From LCVista
 - Using a Virtual Integration
 - Using an Event App Integration
- API to Build Your Own Custom Integrations



Participate at kate.cnf.io



Virtual Event Apps



Participate at kate.cnf.io

One to Many Format Events

powered by
conferences i/o

Which social media platforms do you use?

Facebook	81%	
Twitter	86%	
Linkedin	69%	
Pinterest	28%	
Blog	42%	

85 votes cast



Mute

Start Video

Invite

Manage Participants

Share Screen

Chat

Record

Demo Session

December 18, 2020, 9:00am to 10:00am

Go Back

Which social media platforms do you use?

Mark All That Apply

☐ Facebook

☐ Twitter

☐ Linkedin

☐ Pinterest

☐ Blog

Submit

zoom

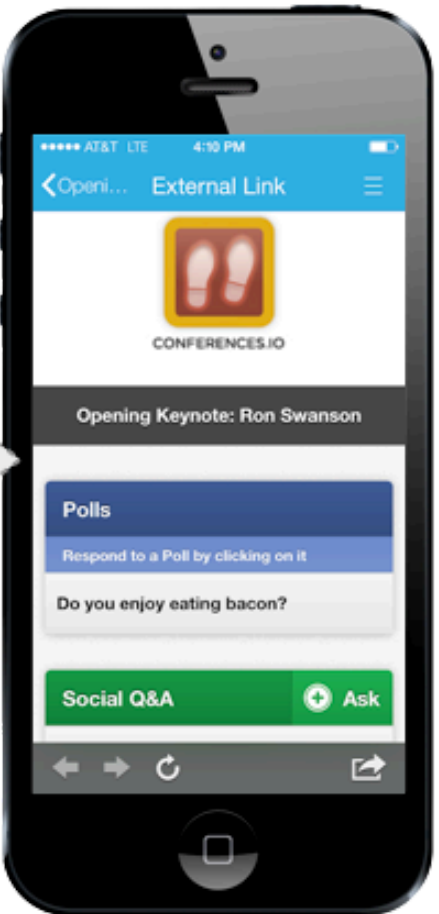
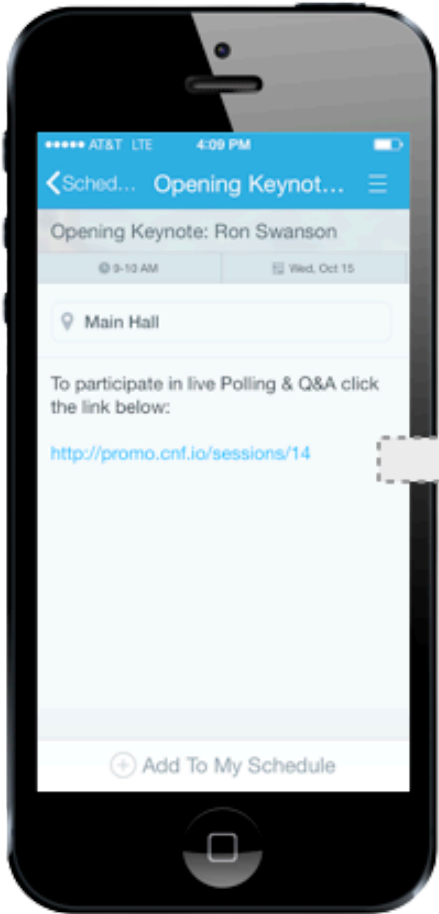
BigMarker

YouTube
LIVEEVENTS



Participate at kate.cnf.io

Livestreaming & Event App Integrations



Participate at kate.cnf.io

Other Integrations & Partners



Sizzabo



Freeman



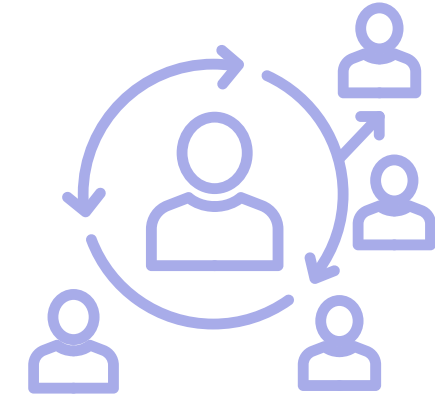
Participate at kate.cnf.io

CPE Tracking

**Group
Internet
Based**



**Internal &
External
Events**



Group Live



**Classroom
Style**



Hybrid



Conferences



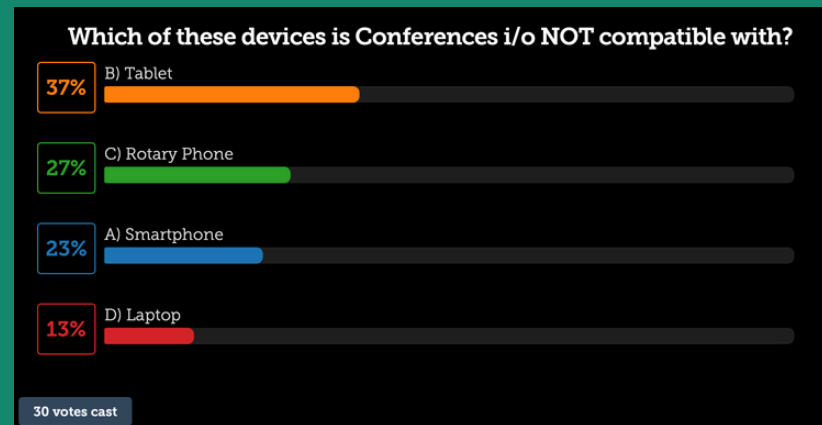
Participate at kate.cnf.io

Elements of Engagement



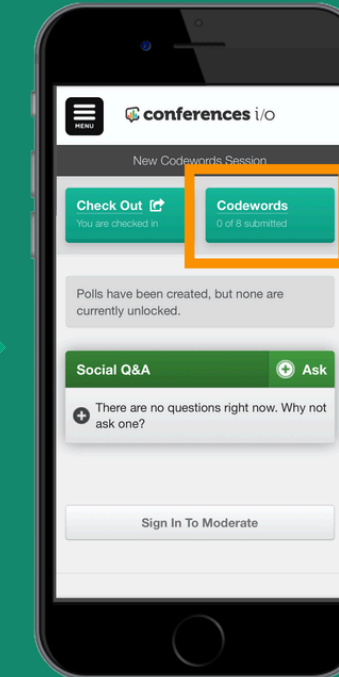
Real-Time Engagement

Polls



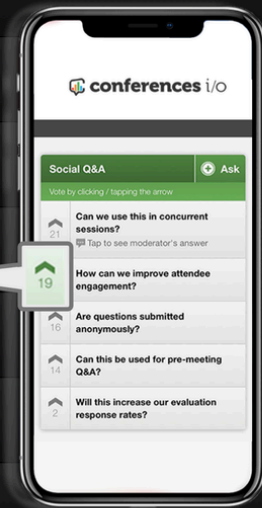
Attention Checks

Codewords



Ask Questions

- 32 Can we use this in concurrent sessions?
- 32 How can we improve attendee engagement?
- 26 Can this be used for pre-meeting Q&A?
- 17 Will this increase our evaluation response rates?
- 16 What data is captured from users?
- 9 Are Active Learning and Engagement the same thing?
- 5 Where did you grow up?



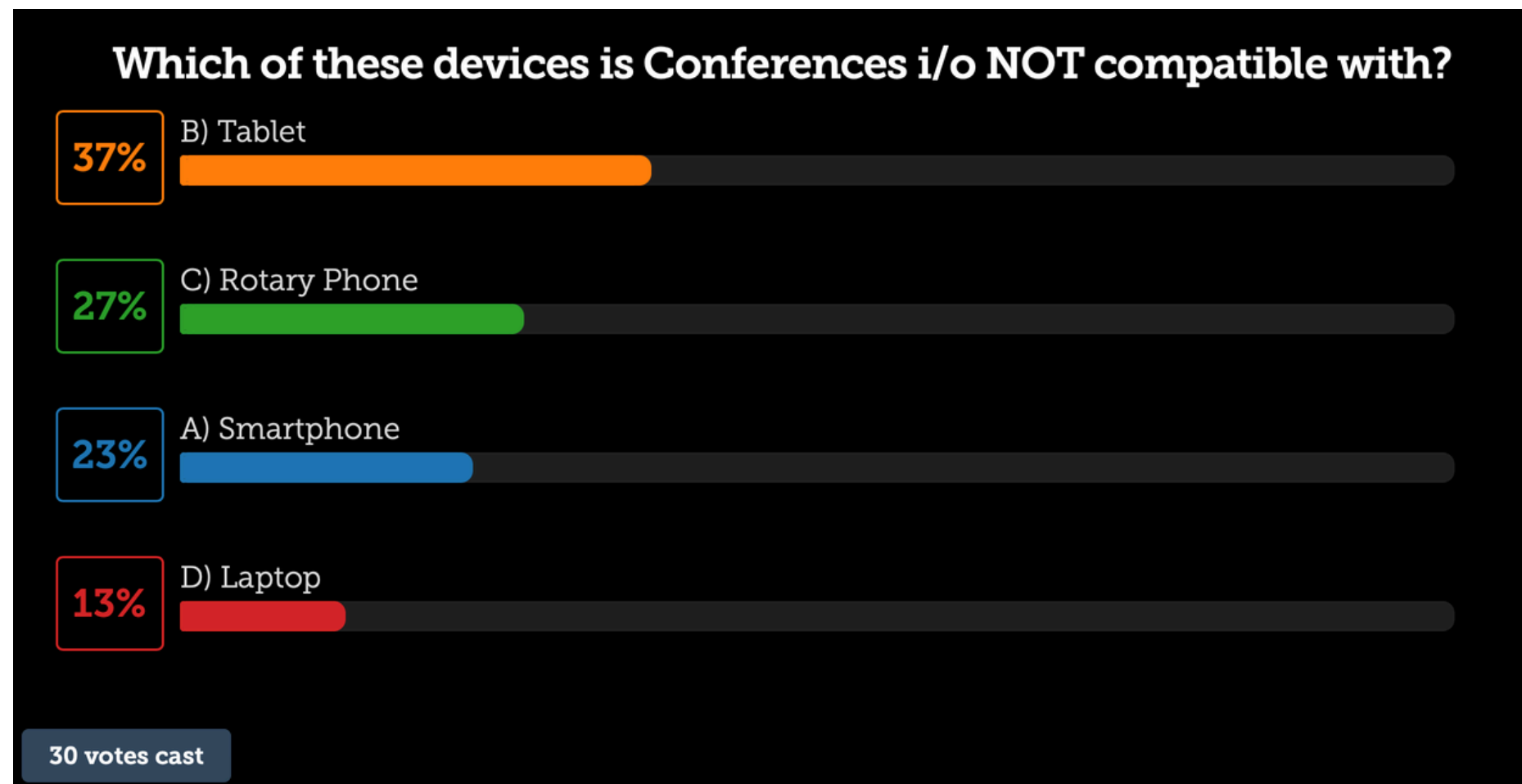
Play Games



Participate at kate.cnf.io

Attention Checks

Polls



Codewords

CPE Code #1
Ethics

381

Scan QR code or navigate to <https://webinar.cnf.io>

The smartphone screen displays the Conferences i/o app. At the top, it says 'conferences i/o' and 'New Codewords Session'. Below this, there are two buttons: 'Check Out' (with a checkmark icon) and 'Codewords' (with a plus icon). The 'Codewords' button is highlighted with an orange box. Below the buttons, it says 'You are checked in' and '0 of 8 submitted'. Further down, there is a section for 'Social Q&A' with an 'Ask' button. At the bottom, there is a 'Sign In To Moderate' button.



Participate at kate.cnf.io

Codewords

Automatically Generate Codewords

Generate this many codewords **per credit**

3

⬆

⬆

☒ Generate codewords for each credit

For example, if you generate 3 codewords per credit, a field of study with 4 credits will be given 12 codewords

Close

Fields of Study

Field of Study	Credits
Ethics	2.0

Codewords (optional)

924 (Ethics)	🗑
460 (Ethics)	🗑
428 (Ethics)	🗑
500 (Ethics)	🗑
526 (Ethics)	🗑
397 (Ethics)	🗑

- Autogenerated
- No Extra technology to download (no add-ins, apps, etc.)



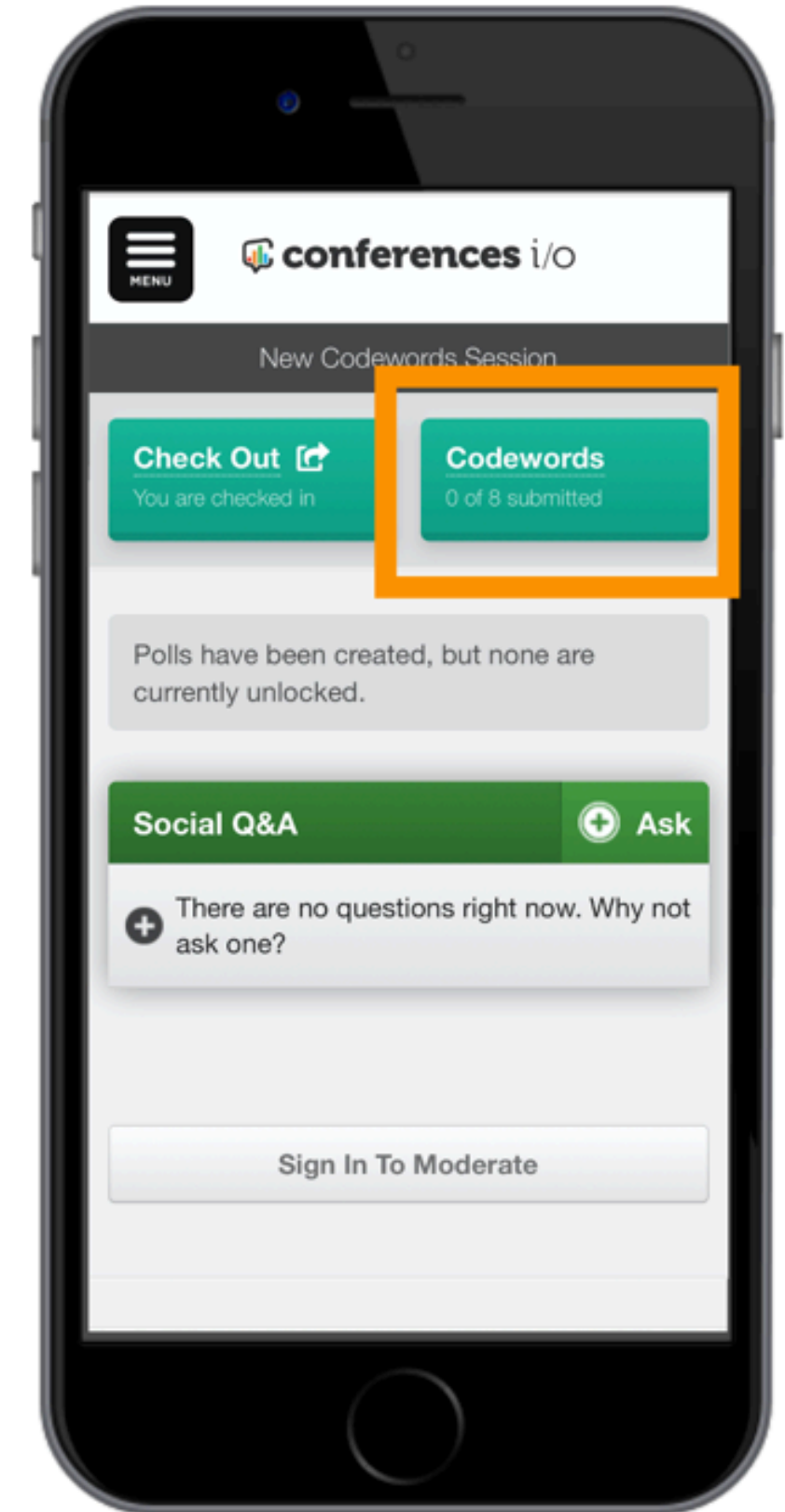
Codeword #1

CIO

378



Scan QR code or navigate to
<https://kate.cnf.io>



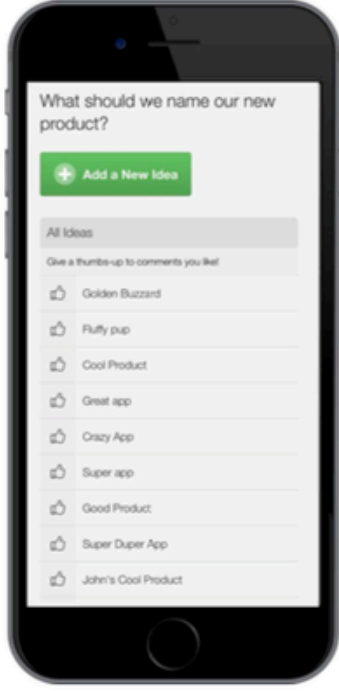
Polls

- **Automate Attention Checks Using:**
 - *PowerPoint*
 - *Keynote*
 - *Google Slides Apps*
- **PollSense generates content-related polls for presenters**
- **Multiple Poll Types**



Real-Time Polling

Not just for Attention Checks...



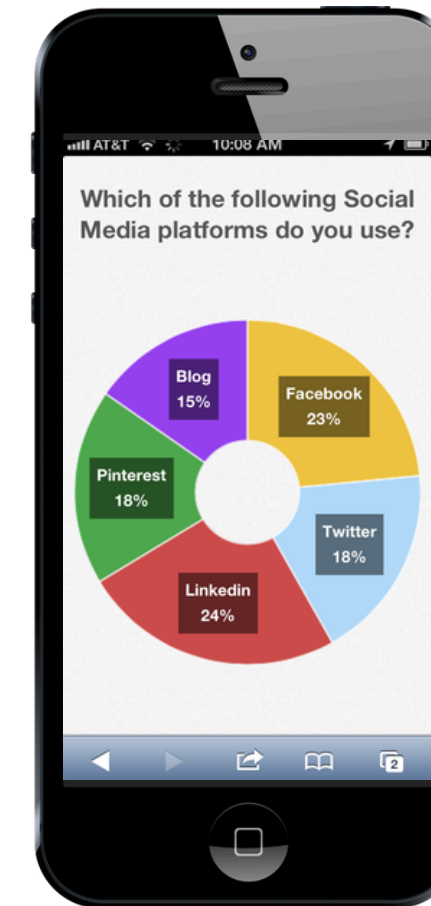
Attendees submit ideas and can "like" ideas from other attendees

What should we name our new product?

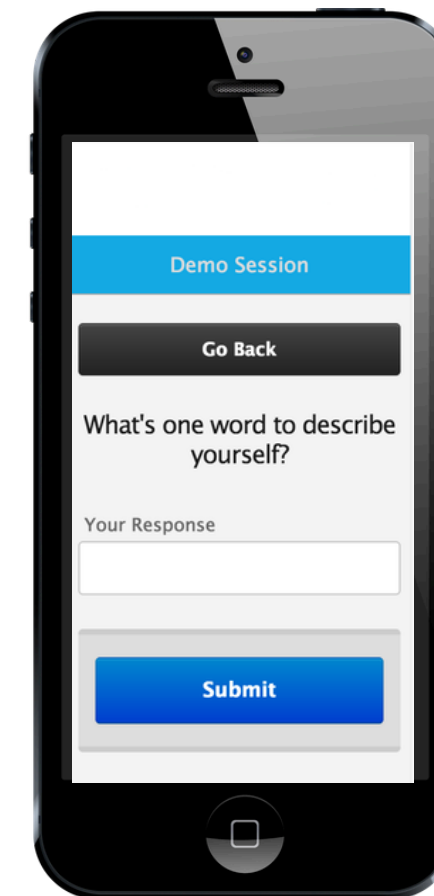
Fluffy pup	9	Golden Buzzard	6	Super Duper App	5
Good Product	3	Cool Product	3	Really Great App	3
Best App Ever	3	John's Cool Product	2	Super app	2

Results display the most popular ideas or answers that have been submitted

- Attendees are able to respond to Poll questions
- View the results in real-time on their own device or up on the big screen
- We offer a variety of different Polling options



Multiple Choice



Demo Session

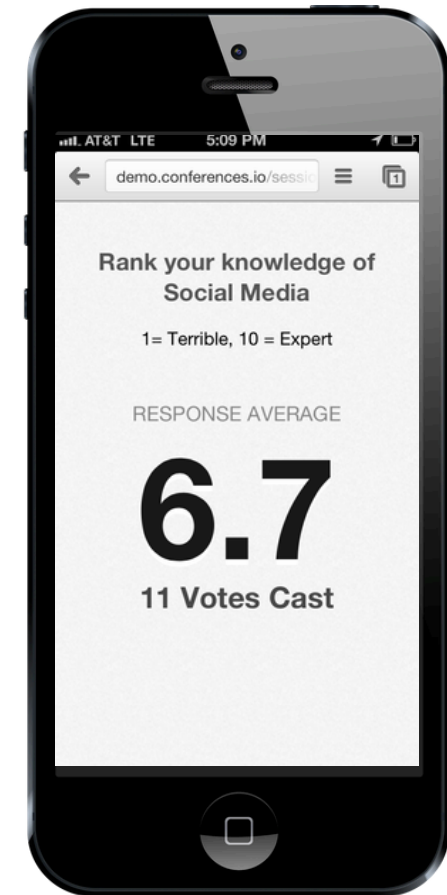
Go Back

What's one word to describe yourself?

Your Response

Submit

Open-Ended



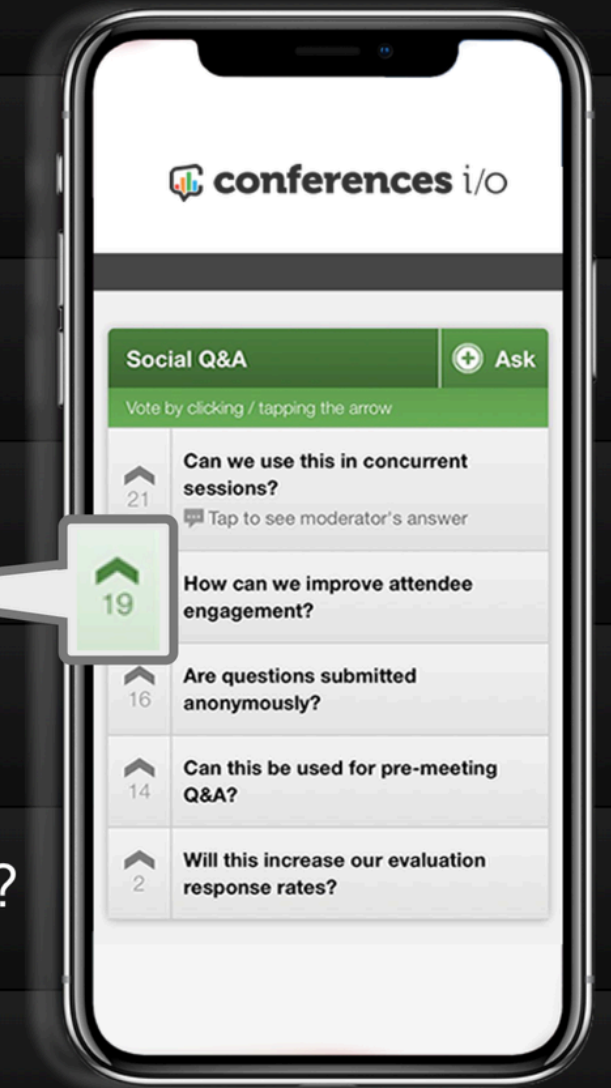
Numerical Average



Social Q&A

- Ask and up-vote questions
- Assign questions to specific presenters
- Robust Moderator functionality
- Exportable Data

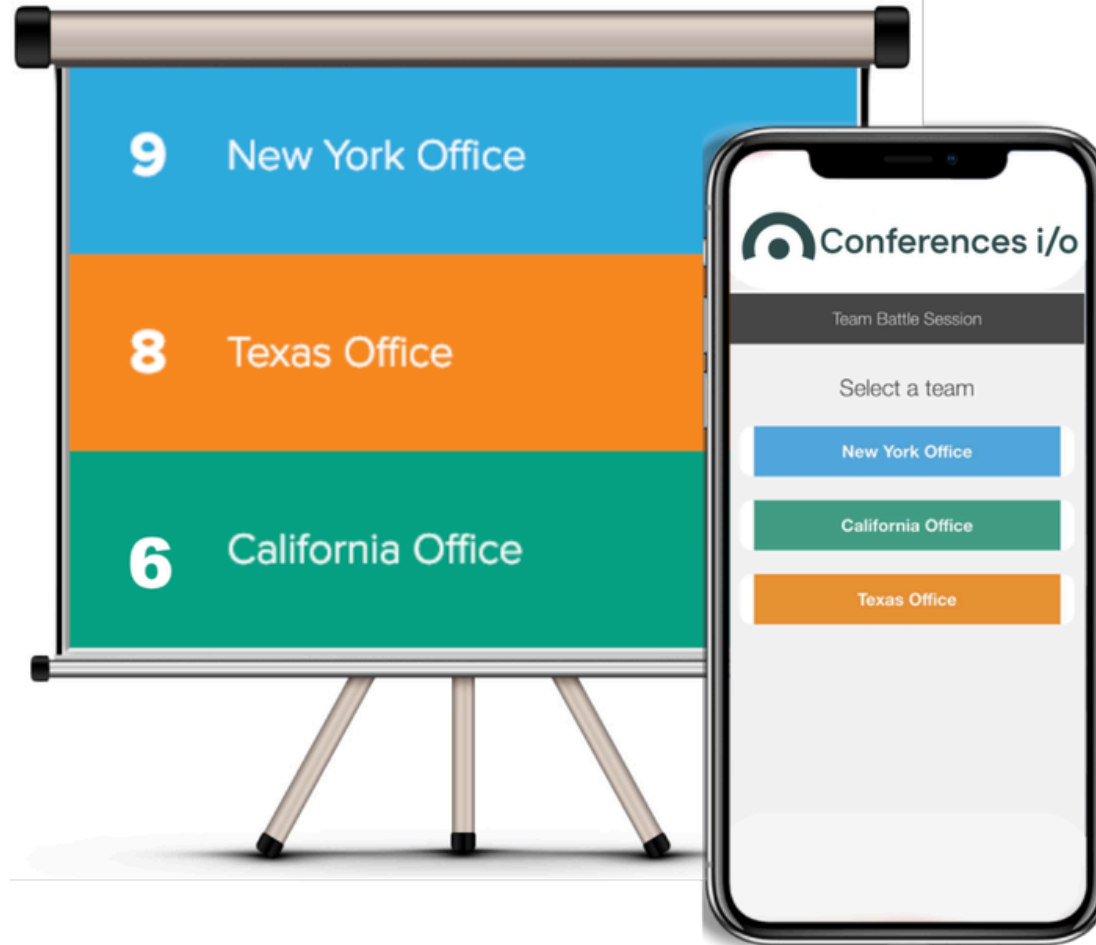
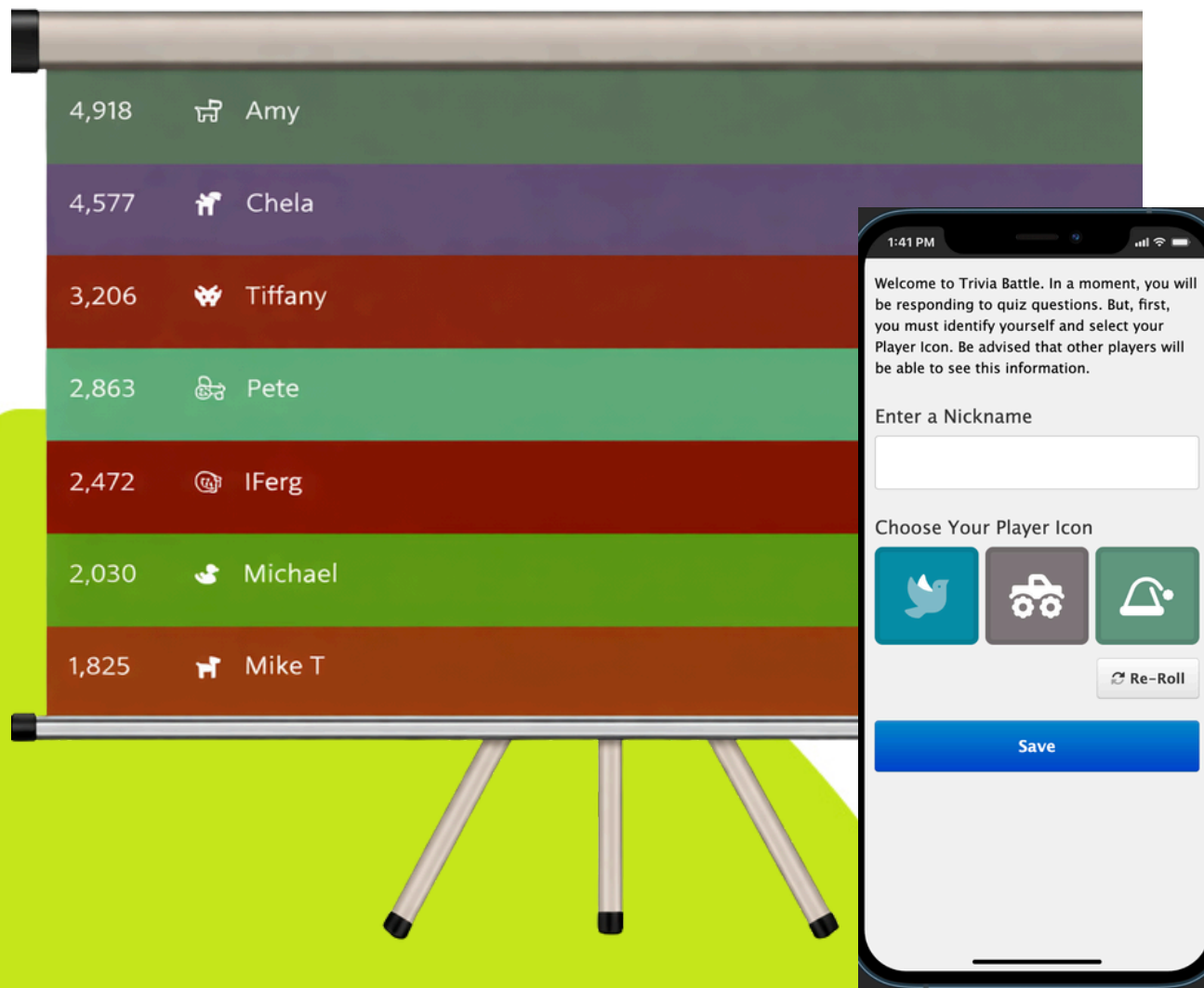
- 32 Can we use this in concurrent sessions?
- 32 How can we improve attendee engagement?
- 26 Can this be used for pre-meeting Q&A?
- 17 Will this increase our evaluation response rates?
- 16 What data is captured from users?
- 9 Are Active Learning and Engagement the same thing?
- 5 Where did you grow up?



Games & Content



Games



Team

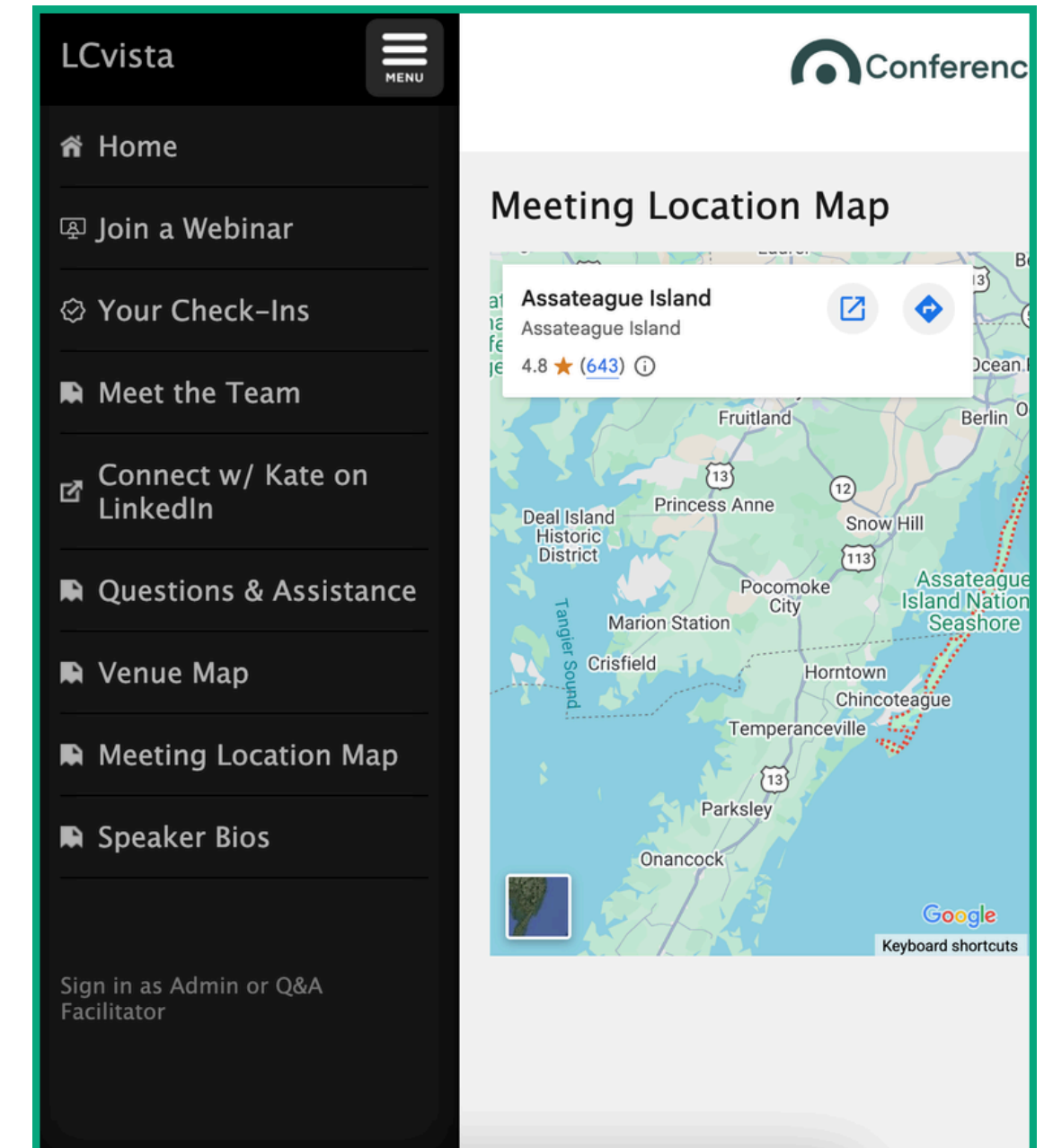
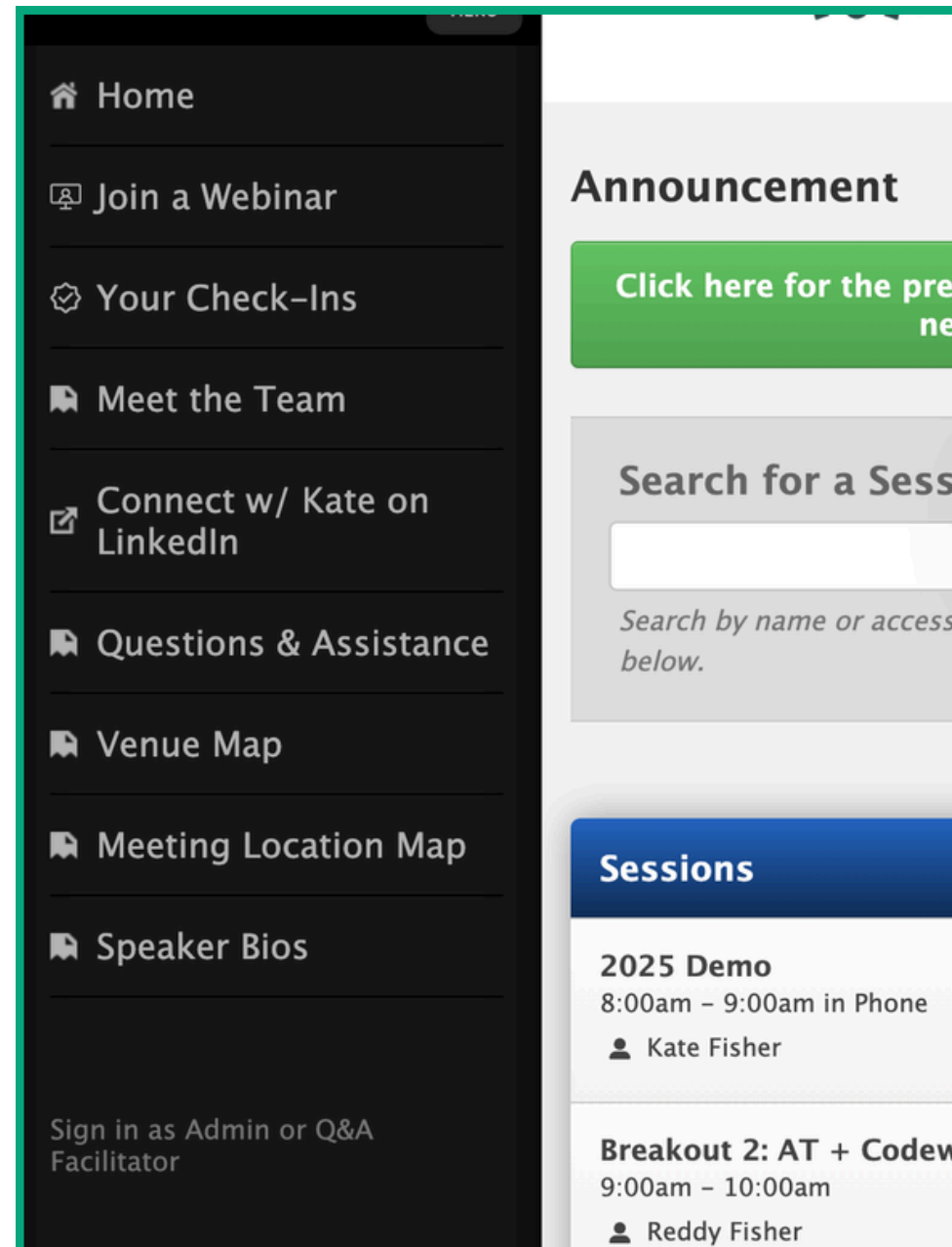
- Competitive, **quiz-style games**
- Points awarded
- Attendees **compete** as **teams** or **individuals**
- Display a **real-time scoreboard**
- **Customize the scoring**
- **Incentivize Participation:**
“If you stick around, we will play a game at the end...”



Participate at kate.cnf.io

Attendee Resources & Communication

- Need to share information with attendees for a conference? Pages can help:
 - *Attendee List*
 - *Speaker Bios*
 - *Embed Webpages*
 - *Embed PDFs*
 - *Share downloadable files with attendees*
- **Announcements**



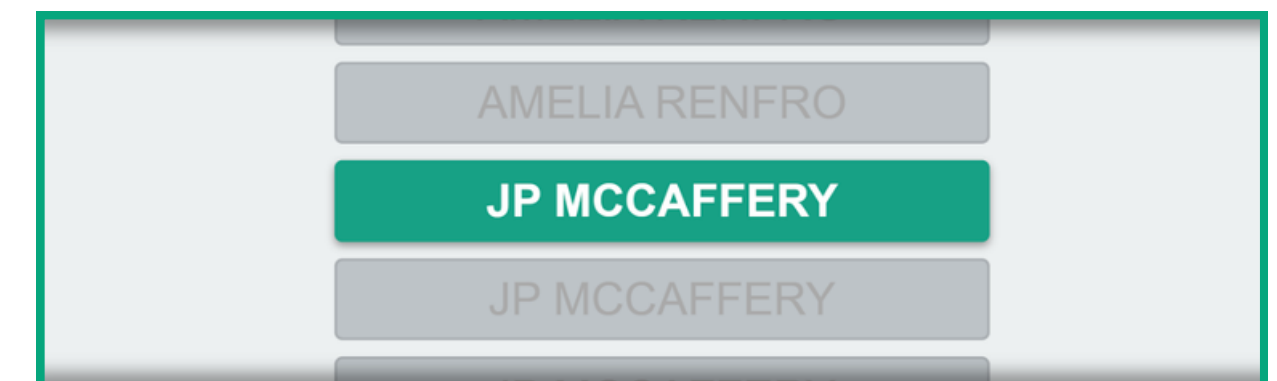
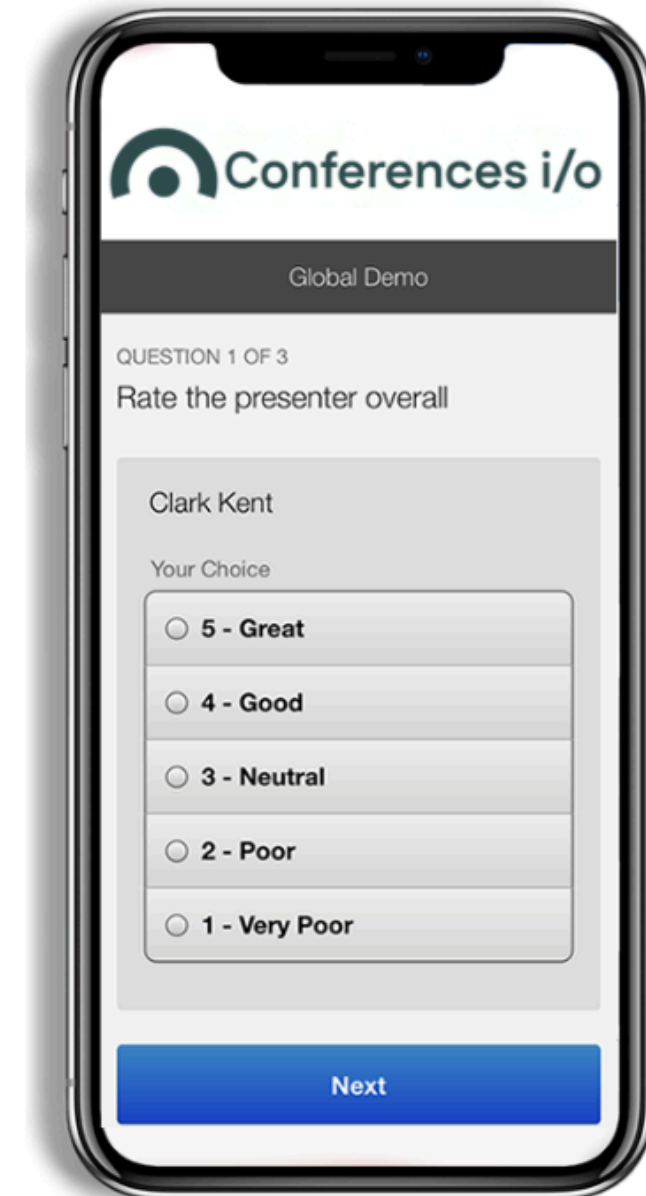
Participate at kate.cnf.io

Real-Time Evaluations, Reporting, and Certificates



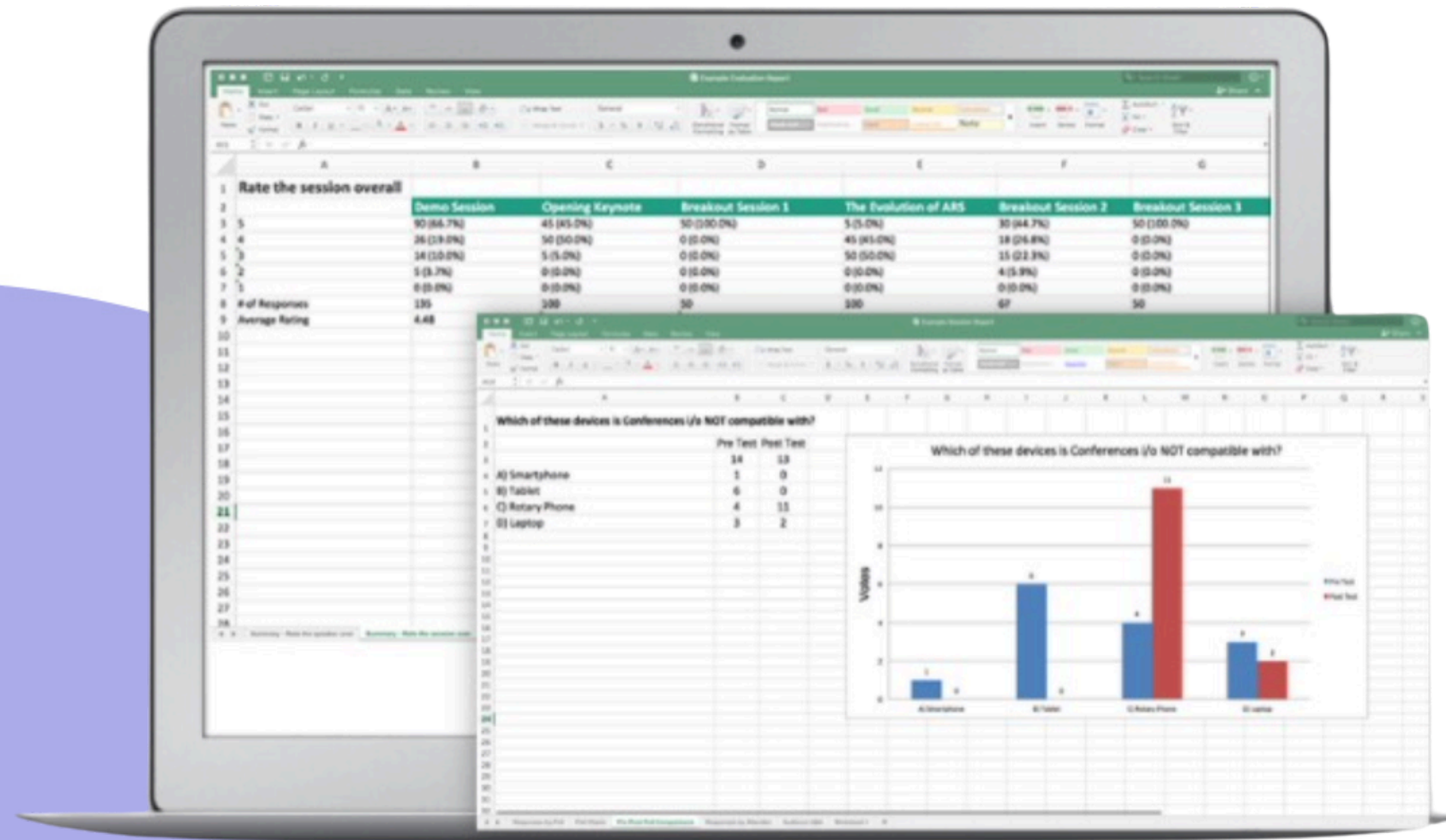
Real-Time Evaluations

- **Real-time evaluations** for higher response rates
- Allow attendees to **evaluate individual presenters per session** and **individual learning objectives**
- **Comprehensive Reporting** for All Sessions
- **Leverage raffles** to increase response rates



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Reporting



- Time stamps and attention checks in **one report**
- **Exportable Data:**
 - *Attendance Tracking*
 - *Polls*
 - *Social Q&A*
 - *Evaluations*
 - *Games*
- **Integrates into LCVista** for Easy Grading



Awarding Credits

LCvista Integration

Filter Attendees

You can filter by any information

Sort: Last Name (A to Z)

ATTENDEE	CHECK-IN DETAILS	POLLS	CREDITS	ELIGIBLE FOR CERTIFICATE?	ACTIONS
Mat Norton matt@cnf.io Edit Remove	Check In - Self Check-In (No Code) Fri Mar 25, 9:13am Check Out - Delivery Format In-person	All Polls 0 of 3 (0.00%) Donuts 0 of 0 (0%) No Field of Study 0 of 3 (0.00%)	Donuts 3 Adjust Credits	Yes Change	Download PDF Certificate Send Certificate
Alex Norton alex@cnf.io Edit Remove	Check In - Self Check-In (No Code) Thu Mar 24, 4:22pm Check Out - Standard Session Checkout Thu Mar 24, 4:23pm Duration / In-Session Time 0 minutes Delivery Format In-person	All Polls 0 of 3 (0.00%) Donuts 0 of 0 (0%) No Field of Study 0 of 3 (0.00%)	Donuts 3 Adjust Credits	Yes Change	Download PDF Certificate Send Certificate

Raw Data Report

EXPORT

DATA OPTIONS

COMPLETION DATA REPORT

Session Info

Session Name

Accounting Update

Session ID

102122-1

Session Credits Available

1

Meeting Name

Accounting Update

URL

Timezone

US/Pacific

Session Start Date/Time

5/25/2022 4:00 PM

Session End Date/Time

5/25/2022 4:15 PM

Webcast Start - End

5/25/2022 12:00 AM - 5/25/2022 11:59 PM

Duration

[\(Edit\)](#)

Total Number of Users

2

Last Updated (local time)

5/25/2022 4:06 PM

Credential Name

Account One

Ruleset

Ruleset LCvista

Search...

minutes	Delivery Method	Codewords Possible	Codewords Missed	Codewords Valid	Codewords Valid List	Codewords Missed List	Codewords Valid (%)	Codewords Missed (%)
	virtual	3	2	1	334	622, 271	33	66
	virtual	3	1	2	622, 271	334	66	33

1

ITEMS PER PAGE: 10



Issuing Certificates





Certificate of Completion

This is to certify that
Admin Johnson
has successfully completed the program:
stef CIO Test
and has received the following Continuing Education Credits (CPEs):

Total CPE Credits: 1.0

Taxes	1.0
-------	-----

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour.

Instructional Delivery Method: Group internet based
Date: 4/12/2019
Program Location:

National Registry of CPE Sponsors ID: [redacted]
Texas CPE Sponsorship ID: [redacted]

 Not all sponsors are registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

Compliance Services

Certificate of Completion

is hereby presented to
Scott Carlisle

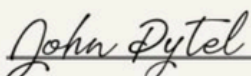
For Successful Completion Of
Small Business Broker-Dealer Auditor Fo
Group Live

2 Auditing, 2 Accounting, 1 Governmental Accounting
5 CPE Credits

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour. Participating state boards of accounting have final authority on the acceptance of individual courses for CPE credit.



John CPA Firm
1111 Street, Chicago IL 60654
National Registry Sponsor Number : 141642


John Pytel
CPE Manager

Credits (CR)

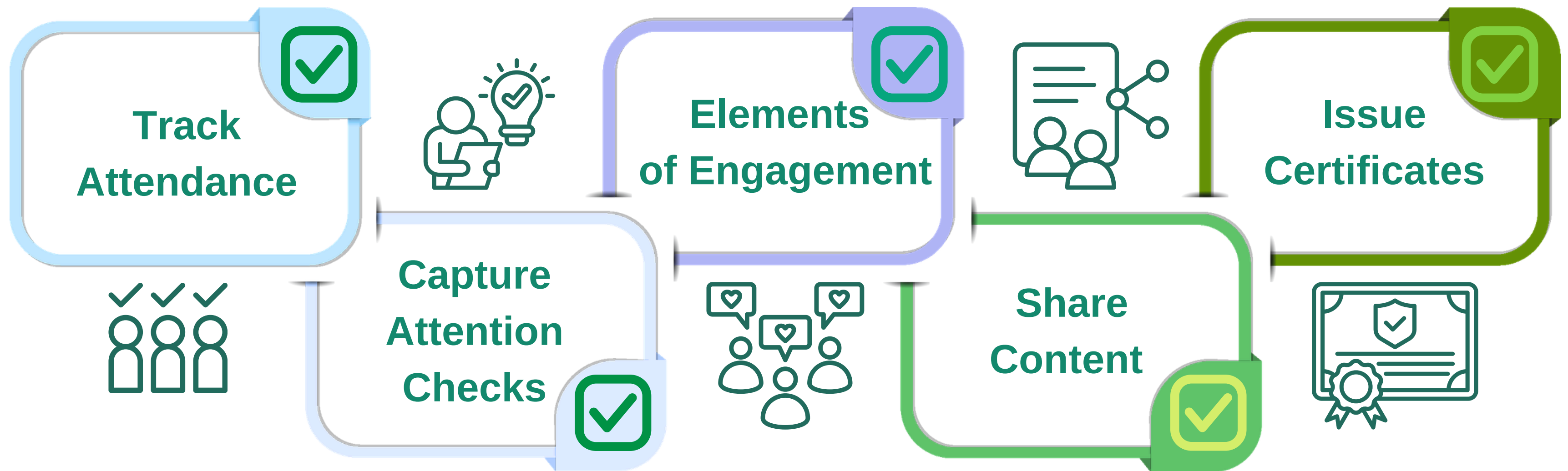
Session : (Managers) Auditing Not-for-Profit Entities: Superior Skills for an Effective and Efficient Audit Fields of Study : Auditing Credits Earned : 1 (12/2/20)
Session : AICPA's Annual Update: Top Governmental and Not-for-Profit Accounting and Auditing Issues Facing CPAs (YB)** Fields of Study : Accounting Credits Earned : 1 (12/2/20)
Session : Jim Martin's Conquering the New Revenue Standard (NEW) Fields of Study : Accounting Credits Earned : 1 (12/2/20)
Session : Surgent's Handbook for Mastering Basis, Distributions, and Loss Limitation Issues for S Corporations, LLCs, and Partnerships Fields of Study : Governmental Accounting Credits Earned : 1 (12/2/20)

- Issue Session level or multi-session certificates
- Customizable Templates



Recap

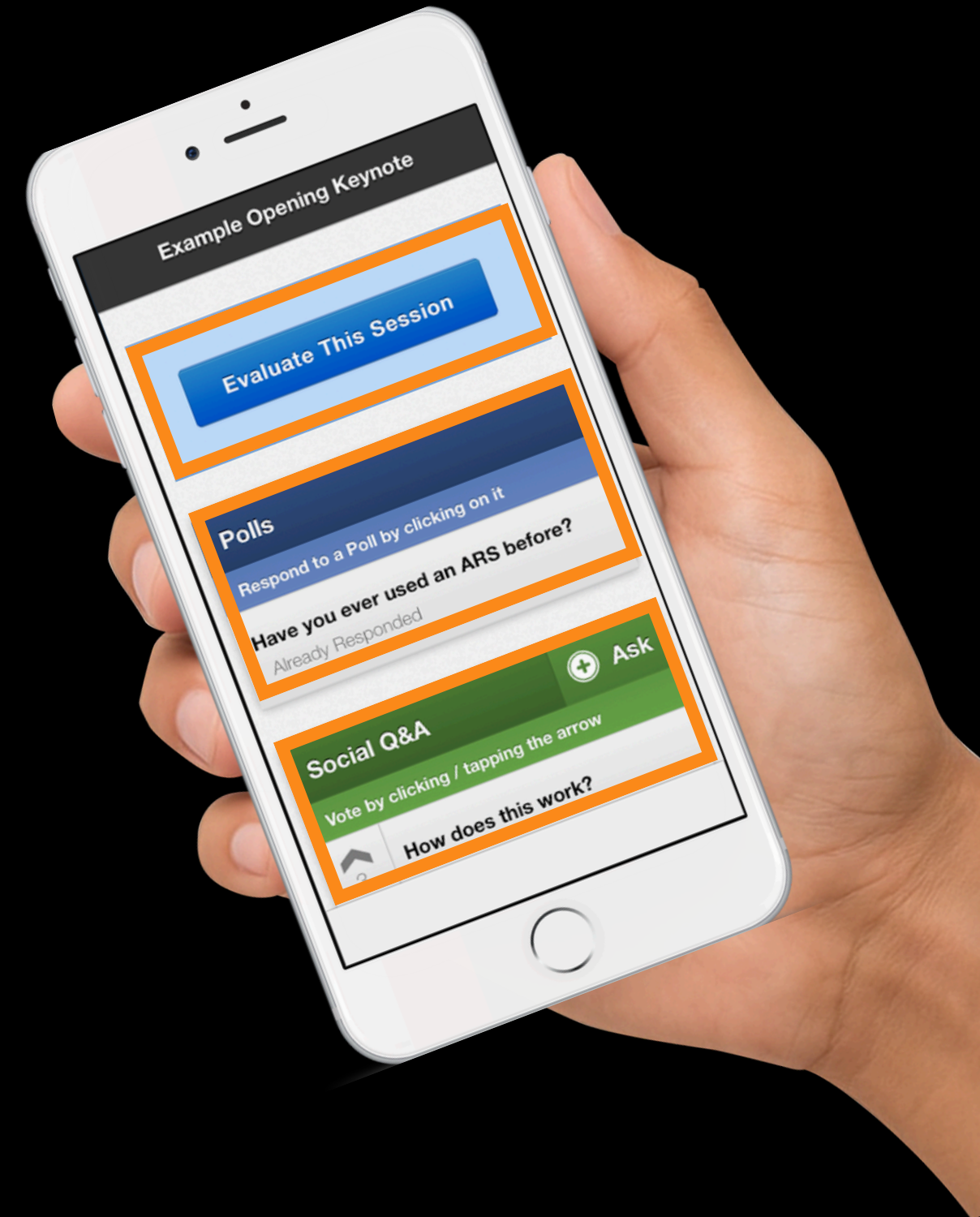
One Tool for All Live CPE Events



Get Ready to Play a Game!



Q&A Time



Participate at kate.cnf.io

Thank you!

Next CIO Webinar May 26th
*“CIO Panel: Best Practices for
Onboarding New Users”*