

**Session Catalog for Sage Summit 2015**  
**Sunday, July 26 2015 - Friday, July 31 2015**  
**New Orleans**

**Report Date: October 28, 2015 02:36 PM CDT**

**PD-346: Sage business partner: A channel partner's essential guide to cloud-based business success**

As a Sage channel partner, are you starting your transformation journey to selling, implementing, and supporting cloud-based platforms and applications? This session is for any channel partner who is delivering or plans to deliver value-added services in a pure cloud or hybrid business model. The right assumptions about your customer segments and your value proposition will drive future revenue and contain future costs. Hear software strategy expert Mike Smart of Egress Solutions share what changes and how to prepare.

**Mon July 27** 04:15 PM - 05:45 PM CDT  
**Location:** Room 252

**PD-347: Sage business partner: Take your marketing to the next level!**

This session is targeted at marketing professionals of every type. We will explore the top new marketing trends and discuss innovative solutions that can help you adapt and succeed in today's ever-changing digital world. You'll hear about new tools and tips and tricks available to you and learn how actionable marketing can help transform your digital footprint.

**Mon July 27** 04:15 PM - 05:45 PM CDT  
**Location:** Room 241

**PD-348: Sage business partner: Payroll and HCM: the road ahead**

This session will include product strategy, vision, integrations, demos, timelines, and target release schedules for Sage HRMS and Sage Payroll Services. Learn about the future for payroll and HCM and how you can get involved.

**Mon July 27** 04:15 PM - 05:45 PM CDT  
**Location:** Room 256

**PD-349: Sage business partner: Sage Construction and Real Estate: the road ahead**

In this breakout session you will learn about the exciting product releases and services launched this year and what's coming in 2016. You'll leave with an understanding of how Sage is working to help our customers solve business problems, increase productivity, simplify processes, and drive decision making.

**Mon July 27** 04:15 PM - 05:45 PM CDT  
**Location:** Room 255

**PD-350: Sage business partner: Sage 100: the road ahead**

This session will include demos, timelines, and target release schedules with on-premises and online. It will address controlled release and how partners can get involved with Sage 100 including access to the product, training plan and rollout, SDK availability for our ISV partners, connections to Sage Payments, Sage Fixed Assets, Sage CRM, and Sage Payroll Services.

**Mon July 27** 04:15 PM - 05:45 PM CDT  
**Location:** Room 243

**PD-351: Sage business partner: Sage 300: the road ahead**

This session will include demos, timelines, and target release schedules with on-premises and online. It will address controlled release and how partners can get involved with Sage 300 including access to the product, training plan and rollout, SDK availability for our ISV partners, connections to Sage Payments, Sage Fixed Assets, Sage CRM, and Sage Payroll Services.

**Mon July 27** 04:15 PM - 05:45 PM CDT  
**Location:** Room 245

**PD-352: Sage business partner: Sage X3: the road ahead**

This session will include demos, timelines, and target release schedules with on-premises and online. It will address controlled release and how partners can get involved with Sage 100 including access to the

product, training plan and rollout, SDK availability for our ISV partners, connections to Sage Payments, Sage Fixed Assets, Sage CRM, and Sage Payroll Services.

**Mon July 27** 04:15 PM - 05:45 PM CDT

**Location:** Room 254

### **PD-353: Sage ISV global program announcement**

Join Alan Laing, Executive Vice President, Global Strategic Partnerships & Alliance to learn about the new Sage ISV global program. The session will be informational to all Sage ISV's that are looking to gain momentum with Sage. The session will cover insights, benefits and road map on the new program and there will be plenty of time for Q & A. You don't want to miss this important announcement and opportunity for Q & A.

**Mon July 27** 04:15 PM - 05:45 PM CDT

**Location:** Room 253

### **PD-354: U.S. acquiring industry and trends**

The growth in the U.S. consumer payments processing market continues to be attractive. In this session, Cofounder and President of The Strawhecker Group Kurt Strawhecker will share insights on opportunities and emerging trends in the market. The conversation will also include a look at the top growth vertical industries to help you target new merchants.

**Mon July 27** 04:15 PM - 05:45 PM CDT

**Location:** Room 240

### **CS-101: How to be a business rule breaker**

Successful business leaders can't follow all the rules. They must pave their own path to success, despite all odds. In this energetic session, you'll hear from executives who don't fear the unknown as they tell you why breaking the rules is sometimes exactly the right thing to do. This session is perfect for the new entrepreneur who is looking for a competitive advantage, as well as the seasoned business owner who is looking to think out of the box and build a culture of risk taking within his or her organization.

**Tue** 11:45 AM - 12:30 PM CDT

**July** **Location:** Customer theater

**28** **Speakers:** Christina Daves (Founder, CastMedic Designs & PR for Anyone), Tereson Dupuy (Founder, FuzziBunz Diapers), Barry Moltz (Speaker, Entrepreneur, Consultant, Author, "Getting Small Businesses Unstuck"), Andrew Schuman (President and CEO, Hammond's Candies)



### **GN-32: Setting up your business in the U.S.**

Like many companies, you may be thinking of expanding your business in the USA. If you want to successfully realize your "American dream," you need to understand the legal and compliance challenges you will have to face. This session will give you key advice on how to set up your business in the U.S. and highlight pitfalls to avoid.

**Tue July 28** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 3A

**Speaker:** Sabine van Egeraat (International Entrepreneur, IBS Global Consulting)

### **HR-7: Getting started with an HR solution**

Are you managing your employee data using Excel spreadsheets or multiple systems? Are you confident you can produce the needed evidence that your company is in compliance with regulations and can defend itself in a lawsuit? Do you spend significant time answering questions of managers and employees? Do you have insight in key performance indicators such as employee turnover rates, effectiveness of recruiting, compensation benchmarks, and more? Learn how a robust human resource management system will benefit your company.


**Tue July** 11:45 AM - 12:30 PM CDT

**28** **Location:** Learning commons 4B

**Speakers:** Mark Butje (Sr Dir, Product Marketing, Sage), Scott Pope (Field Sales Engineer II, Sage)

### **MM-122: What's the outlook for the construction industry in 2016?**

Come and learn what the outlook for the construction industry is for 2016. Where is the economy heading, which segments are growing or declining, and why?

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 5A  
**Speaker:** Ken Simonson (Chief Economist, Associated General Contractors of America)  Full


### **MM-152: Best practices in managing your distribution business**

Distributors face many challenges from managing tight margins and global supply chains to optimizing their inventory and warehouse operations. Pick your topic and participate in a roundtable discussion with Sage partners & experts including HighJump/Accellos, Process Weaver, Edisoft, Sage Inventory Advisor team & BKD. The roundtable discussions are meant to help distribution companies learn from peers and get advice on how to tackle many of the issues related to running their operations. Space will be limited so come early to pick your topic and table.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 5BC  
**Speaker:** Michelle Woolfolk (Director of Product Marketing, Sage)  Full

### **MM-170: Best practices in managing your manufacturing business--a customer-led roundtable**

Join the manufacturing customer roundtable to discuss best practices and to learn from your peers.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 2AB  
**Speakers:** Michael DePasquale (Enterprise Systems Director, Avon Rubber plc), Brandon Gabert (Information Systems Manager, Guardian Chemicals Inc.), Jeffrey Mills (Dir, Product Marketing, Sage)  Full

### **MM-180: Best practices in retail: optimizing and integrating your e-commerce channel to more effectively run your business**

Whether you are a retailer, wholesaler, or other business selling online, the pre-purchase shopping experience has significantly moved to the web, with a vast array of online product & service information, product & business reviews, and price comparison sites influencing the shopper. The need to support mobile and have integration between your brick and mortar operations and e-commerce operations to support a shopper view of real-time inventory, pricing, promotions, and the ability to see status of orders and pick-up and delivery options is critical. If you are a business that is looking for guidance on how to manage all these channels and integrate into your operations, then this session is for you. Join Sage, Sage partner XM Developments, the world's leading supplier of cloud ecommerce for Sage ERP and Medshop Australia, Australia's leading medical supplier to hear best practices to help you evolve your ecommerce channel.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 4A  
**Speakers:** Steven Cumper (Director - Medshop Australia, Medshop Australia), Blair Watkins (Co-founder, Company Director, XM Developments), Michelle Woolfolk (Director of Product Marketing, Sage)

### **MM-300: Sage business partner: Sage Timeslips--the road ahead**

Discuss and provide a high-level overview of the Sage Timeslips roadmap. Discussions will include the future of Sage Timeslips, database changes, certification requirements, and high-level plans for the roll-out of the new database.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 1A  
**Speaker:** James Reese Jr. (Timeslips Product Manager, Sage)

### **MM-308: Integrating Microsoft SharePoint with Sage solutions**


Microsoft SharePoint helps businesses become more productive, increase their collaboration, and automate their business processes. Sage solutions enable businesses to run their day-to-day operations with efficiency and control. Integrating these two powerful platforms results in an advanced unified system that enables data transparency, ease of use, reduced data entry, dramatic enhancements in search and retrieval, seamless integration to Microsoft Office, increased security control and auditing capabilities, reduced costs, and increased collaboration and productivity. Attend this session to see how you can realize


these benefits and more through the seamless integration of Microsoft SharePoint and your existing Sage solution.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 4D  Full  
**Speaker:** Kyle Conquy (ECM Practice Director, Net@Work)

### **MM-387: What is new in Sage ERP X3 (hands-on)**


Attend this session for a walkthrough of some of the newest features available in the latest Sage ERP X3 product update. We have made a number of updates to Sage ERP X3 since the launch of version 7. Join us to see some of these updates and have time to use the latest updates yourself in a hands-on session.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Interactive learning 1  Full  
**Speaker:** Paul Mulcahey (Sr Trainer, Sage)

**Tue July 28** 01:30 PM - 02:15 PM CDT  
**Location:** Interactive learning 1  Full  
**Speaker:** Paul Mulcahey (Sr Trainer, Sage)


### **MM-408: Power up your Excel skills for effective business reporting**


Microsoft Excel is pervasive, powerful, and easy to use, yet most business users still only understand a fraction of its functionality. Enjoy this informative session as the Sage Intelligence experts share the power of Excel as a business reporting tool. Aimed at those who use Excel on a regular basis, this session will showcase a number of powerful financial functions and formulas, PivotTables and PivotCharts, and working with Datalists—all functionality that can significantly improve your reporting skills. Get a glimpse of how Sage Intelligence leverages the power of Excel and how Excel on Steroids training can help you to work smarter, every day.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 3C  Full  
**Speaker:** Sandra Smith (Product specialist, Sage)

### **MM-410: New: Sage Live product demonstration**

You have heard about Sage Live, so now come see the product! Sage Live connects your people to your business, giving constant access to a complete picture so you can make immediate, proactive decisions. Sage Live is a social, mobile, and global business solution with a powerful accounting engine built on the Salesforce platform. Sage and Salesforce.com have joined to deliver the real-time financial and operational data businesspeople need in the crucial moments that matter.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Interactive learning 5  Full  
**Speakers:** Karen Ainley (Head of commercial, Sage), Mary Balmer (Dir, RD, Sage)

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Interactive learning 4  Full  
**Speakers:** Karen Ainley (Head of commercial, Sage), Mary Balmer (Dir, RD, Sage)

### **PR-253: Employee onboarding with Sage Payroll—helping businesses protect their workforce investment**

The employee onboarding process can make or break a new hires experience with your corporate culture. The world has changed, and employees not only expect but deserve a streamlined and informative onboarding process. Learn how our cloud-based HR/payroll solutions lay a foundation that ensures your workers are left with a lasting first impression and can immediately assimilate and bring value to the team.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 5D  
**Speaker:** LaDonna Lewis, CCP (Product manager, HCM, Sage)

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 5D  
**Speaker:** LaDonna Lewis, CCP (Product manager, HCM, Sage)

### **PY-175: Gift and loyalty in the Digital Age**

Consumer loyalty continues to challenge smaller businesses. Brand recognition is key, and finding ways to build brand awareness and compete with the larger competition is important to continued growth. In this panel, experts from Sage Payment Solutions, iMobile3, and Yiftee will discuss how new innovations in the gift and loyalty space have revolutionized brand recognition and created entirely new ways to engage and keep consumers coming back for more.

**Tue July 28** 11:45 AM - 12:30 PM CDT

**Location:** Profit theater small

**Speakers:** Chris Brundage (EVP/COO, Check, Sage), Michael Hackney (EVP Sales, iMobile3), Lori Laub (Co-Founder, Yiftee), John Laurell (VP, Sage)

### **SA-29: For accountants-bookkeepers in public practice and Sage business partners: The shift is on: How Sage View can help you and your firm evolve for the future**

This session provides an overview on how traditional firms are evolving into firms of the future. With the advances in technology used by accounting professionals today, including Sage View, you can transform your client base into one that increases your profitability and frees up time in your schedule, all while making you an even more valuable advisor.

**Tue July 28** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 1B

**Speakers:** Gary Olynik, CPA, CMA (Accountant Advocate, Sage Accountant Solutions, Sage), Laurie Rodriguez, CSPO (Sr. Product Manager, Sage Accountant Solutions, Sage)

### **SA-54: Start with why**

How to apply Simon Sinek's principles to an accounting or bookkeeping practice and why it directly affects profit. The session will cover an overview of the golden circle, how to define your ideal client and service offering, how to differentiate while offering the same service, and how to define and express a why.

**Tue July 28** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 4C

**Speaker:** Josh Zweig (Co-Founder, LiveCA, LLP)

### **SB-175: Sage 50--U.S. Edition financial reports for the owner or CEO**

Start every day with a quick check of your business financials. Get a bird's-eye view without diving into the details, just enough info to take action on the day.

**Tue July 28** 11:45 AM - 12:30 PM CDT

**Location:** Interactive learning 4

**Speaker:** Antonio Soeiro (Account Manager, Sage)



Full

### **SB-216: An introduction to Sage One**

Join the Sage One product team and get an introduction to the newest solution from Sage. This online accounting software offers simple features and functionality for small business owners and entrepreneurs. Learn to create your own account, configure account settings, send your first invoice, and record an expense! Learn directly from the product experts and have the opportunity to get all of your questions answered.

**Tue July 28** 11:45 AM - 12:30 PM CDT

**Location:** Grow theater small

**Speaker:** Mike Savory (Global Product Manager, Sage One, Sage)



Full

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Grow theater small

**Speaker:** Mike Savory (Global Product Manager, Sage One, Sage)

### **SB-232: Small business roadmap: the Canadian market**

Join Scott Munro, VP product management for Sage 50 and Sage One, as he unravels the roadmap for small business solutions in the Canadian marketplace.

**Tue July 28** 11:45 AM - 12:30 PM CDT


**Location:** Interactive learning 3

**Speakers:** Paul Ellis (Dir, Product Management, Sage), Scott Munro (VP, Product Management, Sage)

**Tue July 28** 04:30 PM - 05:15 PM CDT  
**Location:** Grow theater small  
**Speakers:** Paul Ellis (Dir, Product Management, Sage), Scott Munro (VP, Product Management, Sage)


### **SP-106: Business automation--the document management initiative**

Do these situations sound familiar to you? Too much paper, convoluted access to documents, and/or no control over day-to-day processes and time. The concept of business productivity can become a reality by adopting a document management initiative and automating age-old paper practices. After this brief presentation, you will walk away more educated about document management and the ROI of this automation tactic. Go paperless with Sage ERP Document Management in any department, with any process, and anywhere . . .

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Sponsor theater B  Full  
**Speaker:** Doug Tanner (Senior Sales Engineer, Altec)

### **SP-113: AP automation adoption: the challenges, benefits, and true value across the enterprise**

As a Sage ERP user, you know just how much time this powerful electronic accounting solution can save you. But are you using it to its fullest potential? If you are still performing manual data entry, you are only halfway to achieving the real benefits of your Sage system. Make the very most of your investment! Join this session to explore the current state of A/P automation and associated challenges, evaluate benefits of "end-to-end" automation and positive outcomes for your organization, and learn essential steps in achieving automation and eliminating manual processes.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Sponsor theater A  Full  
**Speaker:** Mike Share (Channel Manager, ACOM)

### **SP-126: Increasing productivity in the modern workplace**

This presentation covers the changing work and business landscape and how Microsoft is not only keeping pace with the changes, but investing into the future to anticipate and take advantage of them.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Differentiate theater large  
**Speaker:** Juha Harkonen (Business Evangelist, Microsoft)

### **SP-128: Who's driving your data-driven business?**

Big data is supposed to make things better, right? But every year you invest time and money into data solutions that don't produce results. If data is a Formula 1 race car, you still need an experienced driver to smoke the competition. Join Brett Haymond, Domo's manager of consulting, and Domo customer Tyler Niess, CMO at Crescent Communities, as they discuss the principles and best practices necessary to deliver greater value from high-performance data.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Profit theater large  
**Speaker:** Brett Haymond (Consulting Manager, DOMO)

### **TL-101: Go beyond buzzwords: Focus on building your company's value**

All business success is founded in one single word. Value. Today, technology provides incredible new opportunities for business owners. Internet technologies such as social media, mobile devices, web stores, digital documents, email marketing, web-based customer support services, and online accounting can be combined to deliver dramatically improved results. But how can you leverage these new world tools to create and enhance value? This presentation will help you connect the dots between geeky buzzwords and real value. You'll leave with a clear vision of how to create more value for customers, your business, and ultimately for yourself.

**Tue July 28** 11:45 AM - 12:30 PM CDT  
**Location:** Lead theater large  
**Speaker:** Doug Sleeter (Founder, The Sleeter Group)

### **TL-104: Create a million-dollar digital presence with one hour and \$25**

People think you need thousands of dollars, a designer, a programmer, an agency, a personal assistant, and lots of luck to create a web presence that impresses. Not true! With tools available today, you can create an impressive presence for just \$25 and an hour of time. In this session we'll help you know the tools available to help you affordably design a beautiful and effective website, responsive email, and much more. This session is ideal for small business owners, startups, and entrepreneurs looking to create a marketing impression that stands out and is affordable.

**Tue July 28** 11:45 AM - 12:30 PM CDT

**Location:** Differentiate theater small



**Speaker:** Flynn Zaiger (CEO, Online Optimism)

### **TL-105: Valuation: how investors size up your business and how to increase it**

This presentation will focus on teaching entrepreneurs the basic concepts of business valuation. Michele will discuss specific methods that private equity and venture capitalists use to calculate value, benchmark success, and decide their levels of investment.

**Tue July 28** 11:45 AM - 12:30 PM CDT

**Location:** Lead theater small

**Speaker:** Michele Avery (Litigation and Valuation Vice-President, LaPorte CPAs & Business Advisors)

### **TL-202: Sage and Salesforce: What this powerful partnership means to you and its strategic impact on the global marketplace**

The front- and back-office is coming together, and businesses want to run Sage's accounting, payroll and finance software from any device, anywhere, anytime. Hear from Sage and Salesforce executives on how they have forged a strategic partnership that brings together the world's #1 small business accounting and payroll solution with the world's #1 CRM solution and enterprise cloud platform.

**Tue July 28** 11:45 AM - 12:30 PM CDT

**Location:** Grow theater large

### **CS-113: Full STEAM ahead: inspiring girls to get involved in science, technology, engineering, arts, and mathematics**

Overall demand is on the rise, but the number of women in science, technology, engineering, arts, and math fields (STEAM) is not. A 2011 report from the Department of Commerce says only one in seven engineering workers is female, while only 27 percent of computer science jobs are held by women. Additionally, women earn STEAM-related degrees at a much lower rate than men, despite the fact that more women graduate from college than their male counterparts. So how can we evoke a change? Panelists in this session will discuss how to get more females involved in STEAM, from larger programs and initiatives to mentoring and one-on-one time with aspiring female students.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Customer theater

**Speakers:** Lisa Kianoff (President, Kianoff and Associates), Lane Kirby (Manager of IT and Distribution Services, Industries of the Blind-Greensboro), Alisha Moore (Vice President of Sales, Girl Scouts of Louisiana East), Gail Perry (Editor-in-Chief, CPA Practice Advisor)

### **HR-8: Adding Sage HRMS to your Sage solution**

We will cover the benefits on integrating Sage HRMS with your existing Sage solution.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 4D

**Speaker:** Scott Pope (Field Sales Engineer II, Sage)

### **MM-109: How business intelligence tools give a competitive edge in the distribution and manufacturing industry**

Using your company's data from your Sage ERP and other sources, critical and immediate business insights across sales, logistics, and purchasing within your operation can give you the competitive edge you need. Learn more from an expert panel that share BI best practices to run businesses better and gain visibility and insights.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 2C

**Speakers:** Nick Castellina (Research Director, Business Planning & Execution, Aberdeen)

Research), Stephen Coull (Sales Director, Sage), Michael DePasquale (Enterprise Systems Director, Avon Rubber plc), Liz Garnand (Product Marketing Mgr, Sage)

### **MM-117: Business Intelligence: Are you sharing too much, too little or the wrong information with managers and employees?**

Employees and managers want to see how your company is doing. So, you created dashboards and put monitors on the walls to rally the team. Now, with mobile, everyone can see these on their smartphones. But, should they? Just how open should you be about your company's performance? In this session, we will share how business scoreboards, collaboration, transparency and gamification are powerful tools if used wisely. Moving from insight to action is critical to success as long as you're moving in the right direction as a team. We'll show ways to help you create alignment and raise accountability in your company using smart technologies and thoughtful scoreboard design.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 4C

**Speakers:** Douglas LaBahn (Product Marketing Sage Life, Sage), Michelle Woolfolk (Director of Product Marketing, Sage)

### **MM-119: My head is in the cloud, but my business is not**

The cloud matters to the future of any fast-growing business, particularly ones that are small to medium size. While the cloud may seem new and maybe even a bit risky, when you learn all the facts, it's clear it's key to securely managing your business, growing the bottom line, improving operations, managing your IT spend, and securing your data.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 4B

**Speakers:** Rob Lawson (Field Sales Engineer III, Sage), Michelle Rowley (Director of Product Marketing, Sage)

### **MM-123: Are you running your construction business through a keyhole?**

Gain deeper insights into your business so you know how healthy your business really is. Attend this session to learn how Sage can help you get the information you need to make better informed business decisions for your construction company. Leverage dashboards, reporting, inquiries, alerts, and more to stay on top of your business and in front of any issues before they happen.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 3A

**Speaker:** Angela Bloomer (Sr. Product Manager, Sage)

### **MM-144: Hear from your peers: how CRM helped me overcome my marketing and sales challenges**

Come and interact with a panel of CRM customers as they discuss the business challenges they faced and how their CRM (customer relationship management) solution helped them progress their business to the next level.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 5D

### **MM-222: Grow your business faster with the new Sage ERP X3 cloud**

Join us to learn about Sage ERP X3 and how it can help your company grow faster, with simpler and flexible cloud business management software. Sage ERP X3 simplifies every part of your business and streamlines all of your core processes –from manufacturing to distribution and financial management. Now available as a service, Sage ERP X3 offers enterprise-level capabilities without the burden of a complex enterprise system infrastructure.


**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 3B

**Speakers:** Jean Huy (VP, Product Marketing, Sage), Benoit Le Tohic (Sr. Product Marketing Manager, Sage), Locke Truong (Dir, Product Marketing, Sage)

### **MM-230: Sage 500 ERP: Do you know what you don't know--core financial features?**

This tips and tricks session lets you explore new features added since the release you are currently using in core financials with a Sage expert proctor on hand, plus the experiences of your peers to draw from.

**Tue July 28** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 5C  Full  
**Speaker:** Linda Cade (Sr. Product Manager, Sage)


### **MM-299: Maximize your time and money with Sage Timeslips**

Discover how Sage Timeslips can improve your business's overall efficiency while increasing profitability. Explore the function and features of this industry-leading time and billing software with this informative product overview session.

**Tue July 28** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 4A  
**Speaker:** James Reese Jr. (Timeslips Product Manager, Sage)


### **MM-374: Sage Fixed Assets 2015: tips, tricks, and the road ahead**


Learn the tips and tricks our product experts use to get the most out of Sage Fixed Assets 2015, and find out what is ahead for the product line. Attending this session will make you more be more proficient in using Sage Fixed Assets today, and it will help you understand what the upcoming improvements in Sage Fixed Assets can do for you. Please note that MM-183 and MM-374 are identical session, giving you the opportunity to choose when you want to attend.


**Tue July 28** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 3C  Full  
**Speakers:** Robert Bassett (Dir, Inside Sales, Sage), Grant Griebel (Inside Sales Engineer, Sr, Sage)

### **MM-381: Tips and tricks on how Sage 100 ERP can move your business forward now and into the future**

This session covers tips and tricks on how you can get more out of Sage 100 ERP to streamline your business processes, improve access to key business insights, stay compliant with the latest government mandates, and grow your business into future.

**Tue July 28** 01:30 PM - 02:15 PM CDT  
**Location:** Interactive learning 3  Full  
**Speakers:** Shelley Arnold (Customer Support Analyst, Advisory, Sage), Diane Coffman (Product Owner Business Analyst, Sage), Deborah Nelson (Product Manager, Sage)

**Tue July 28** 04:30 PM - 05:15 PM CDT  
**Location:** Interactive learning 3  Full  
**Speakers:** Shelley Arnold (Customer Support Analyst, Advisory, Sage), Diane Coffman (Product Owner Business Analyst, Sage), Deborah Nelson (Product Manager, Sage)

**Wed July 29** 02:30 PM - 03:15 PM CDT  
**Location:** Interactive learning 3  Full  
**Speakers:** Shelley Arnold (Customer Support Analyst, Advisory, Sage), Diane Coffman (Product Owner Business Analyst, Sage), Deborah Nelson (Product Manager, Sage)

### **PR-164: Sage Payroll Services partners only: Making the move to Sage Payroll Services**

This is a closed-door session for Sage Payroll Solutions legacy system resellers. It will highlight the migration path to the current cloud-based platform.

**Tue July 28** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 1A  
**Speaker:** Bruce Arruda (VP Client Services SPR, Sage)

**Wed July 29** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 1A  
**Speaker:** Bruce Arruda (VP Client Services SPR, Sage)

### **PR-165: Sage Time Essentials--disruptive technology meets time and attendance**

Disruptive technology meets time and attendance. Sage Time keeps it simple and affordable. In this presentation you will learn what an essentials time and attendance system can do for you!


**Tue July 28** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 2B  
**Speaker:** Greg Javins (Vice President, Sage)

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 2B  
**Speaker:** Greg Javins (Vice President, Sage)

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 2B  
**Speaker:** Greg Javins (Vice President, Sage)

### **PY-165: The EMV standard, what it means to small and medium-sized businesses, and how to get there**

The magic date is October 15. It is what we call the liability shift from the issuer to the merchant. In this session, learn who is ultimately responsible, how this affects brick-and-mortar and card-not-present merchants, futureproof terminals, and what small and medium-sized business merchants need to consider to make this shift a reality.

**Tue July 28** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 5A  
**Speakers:** Robert Bertke (SVP, RD, Sage), Todd Metheny (Product Manager, Sage)  Full


### **SA-30: For accountants-bookkeepers in public practice and Sage business partners: From spreadsheets and shoeboxes to cloud computing: moving to the cloud with Sage One**

Do some of your clients seem to be ahead of you in adopting cloud software? The accounting profession is embracing the cloud, and it is quicker and easier than ever for you to join in. Cloud computing not only means less cost and maintenance, it also ensures you can deliver the high level of service that your clients expect. In this session, you will learn about the ins and outs of the cloud and how to get your practice ready for clients that want a cloud-based solution such as Sage One.

**Tue July 28** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 2A  
**Speaker:** Mike Savory (Global Product Manager, Sage One, Sage)  Full

### **SB-178: Sage 50--U.S. Edition financial reports for the CFO, controller, and finance manager**

If you love digging into the details, this is the course for you. You'll learn everything from customizing your financial reports and dashboards to using built-in safeguards like audit trails and the internal accounting review.

**Tue July 28** 01:30 PM - 02:15 PM CDT  
**Location:** Interactive learning 4  
**Speaker:** David Ako-Bryant (Intelligence Solutions Specialist, Sage)  Full

### **SB-217: On the road again with Sage One**

What is new and what's next for Sage One? Learn about all of the new features that Sage One has introduced over the past six months and what is on the horizon.

**Tue July 28** 01:30 PM - 02:15 PM CDT  
**Location:** Grow theater small  
**Speaker:** Sean Mallean (Global Head of Product for Sage One, Sage)

### **SP-100: Driving high-impact supply chain performance with ERP integrated solutions for omnichannel distribution featuring Zinus Inc.**

In this interactive session, Senior VP of Zinus Inc Brad Song defines why having the right supply chain strategy and software solutions to support it drives supply chain performance for omnichannel distribution. Gain valuable perspective on the power of ERP integrated solutions for warehouse automation and how this technology is helping to drive e-commerce and B2C growth at Zinus Inc with the added benefit of consistently reducing costs, complexity, and risk. Find out how this successful manufacturer/distributor is leveraging the power of the ERP integrated Edisoft® Merchant QuikPAK™ Warehouse Automation Solution to eliminate the rekeying ERP order and shipment data; increase staff productivity; gain greater visibility into the cost of shipments; get an objective overview of the corporate KPIs used to evaluate Edisoft's ERP integrated supply chain solution sets. Hosted by: Kelvin Takhar, GM and VP of sales, Edisoft Inc. Special guest: Brad Song, senior VP of Zinus Inc

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Sponsor theater B

**Speaker:** Kelvin Takhar (Vice President, Sales & Marketing, Edisoft)

### **SP-110: The mobile device warehouse and manufacturing take over**

Learn how iOS and Android devices are revolutionizing the way distribution and manufacturing companies are automating the supply chain. From warehouse management to remote sales and service, learn how arming your company with mobile devices will forever change how you work.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Sponsor theater A

**Speaker:** Cody Smith (Director of Sales, Scanco)



### **TL-107: Secrets to building a personality brand from a network television insider: The Small Business Expert**

Getting your business positioned on television, radio, magazines, and/or newspaper adds credibility and makes you a celebrity in your industry. No one has done this better than Susan Solovic. Known as THE Small Business Expert, she has appeared on thousands of television and radio programs. She was a small business contributor for ABC News Network, she was featured in her own PBS special, and she can be seen regularly on Fox News Network and Fox Business Network. She hosted a nationally syndicated radio show in 30-plus markets across the U.S. She anchored for MSNBC and has debated experts on CNN and CNBC. She blogs for the Huffington Post, Constant Contact, Entrepreneur, Fast Company, AT&T Business Circle, Constant Contact, and many, many more. Plus her own site draws thousand of visitors every month. Want to know how she did it? Susan shares her secrets.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Lead theater large

**Speaker:** Susan Solovic (THE small business, expert)

### **TL-108: Claim your fame: how brilliant businesses turn passion and personality into profit**

Content builds trust. Trust builds relationships. Relationships drive revenue. In today's online universe, everyone has an audience. Overnight, YouTubers with a loyal fan base can drive revenue for any gadget they touch. Email subscribers can be inspired to buy something from their favorite newsletter. Facebook fans can be convinced to buy something right in their newsfeed. In today's online world, smart businesses are leveraging their team's expertise and insight to build booming businesses. In this session, best-selling author and former television producer Andrew Davis will show you how to get rich by targeting a niche. He'll uncover the five simple television secrets you can use to drive demand for whatever you sell. You'll leave inspired to claim your fame.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Profit theater large

**Speaker:** Andrew Davis (Best-selling author and marketing speaker, Monumental Shift)

### **TL-110: Cyber security and emerging technology**

TBD

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Differentiate theater large

**Speaker:** Ron Hulshizer (Managing Director, IT Risk Services, BKD, LLC)

### **TL-111: Get your business off the block: international expansion for startups and entrepreneurs**

Entrepreneurship and the eagerness to take this business spirit abroad is by no means a new concept. The time is now for entrepreneurs to look at the world through a different set of eyes in order to grow and achieve measured success. In this breakout session, we will discuss the benefits of taking your business global and the resources available to support your business growth abroad.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Profit theater small

**Speaker:** Anthony Simmons (International Business, Development Expert)

### **TL-112: Going from a million to a lot more with an hour a week of Google Analytics**

Get a thorough lesson in Google Analytics, from installation to experimentation! Google Analytics is the industry standard tool for tracking visitors on your website and mobile apps, but it can do far more than just measure Internet traffic--it can solve a small business owner's most pressing questions. The course is for both newbies and experienced users. In this session, learn everything from how to install Google Analytics to basics such as navigating the user interface and how to solve common marketing questions, like "Where are my visitors coming from?" and "What pages on my site are causing visitors to stay or leave?" Finally, get resources to tackle more advanced topics on your own, such as determining if your social media/billboard/print strategy is actually working!

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Differentiate theater small



**Speaker:** Flynn Zaiger (CEO, Online Optimism)

### **TL-161: Mr. Spock and Homer Simpson: the two sides of human economic behavior**

While most people think of economists as seers who try to predict the future of the stock market, government deficits, unemployment, and so on, this is far too parochial a view of what economists do. The really fascinating economists are engaged in the study of human behavior. The most fertile minds in economics today deal with observing the world and trying to understand it, not predict it. This session will explore how economics can be used to explain everyday behavior, in a myriad of real-life situations. By discussing the work of the most influential and seminal minds in the economics profession, attendees will gain an appreciation for how the economist views the world and the power of their theories to explain why people behave the way they do.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Lead theater small



**Speaker:** Ron Baker (Founder, VeraSage Institute)

### **TL-200: The science of achievement**

What makes us excel? A professional soldier, sportsman, explorer, entrepreneur, and philanthropist, Justin evaluates new ways of working to create thriving communities within businesses, allowing them to reach higher levels of success. Progressive thinking versus traditional.

**Tue July 28** 01:30 PM - 02:15 PM CDT

**Location:** Grow theater large

### **CS-104: Talking all things startup: increase your chances for long-term success**

According to Forbes, more than 543,000 new businesses launch each month in the U.S. alone. However, many new small businesses fail before they reach the five-year mark. What separates the successful startups from those that struggle? This informative session will cover all things startup: getting loans, growing revenue, adding customers, acquiring additional funding, and controlling costs.

**Tue** 02:30 PM - 03:15 PM CDT

**July** **Location:** Customer theater

**28** **Speakers:** Tereson Dupuy (Founder, FuzziBunz Diapers), Cory McFarlane (Chief Visionary, Pinnacle/CSG), Shameka Reed (CEO, Savvy Inc. PR, Marketing Media Group), Susan Solovic (CEO, THE Small Business Expert)



### **HR-6: Affordable Care Act: a year in the rearview mirror and what's next**

In recent years, as millions of individual consumers coped with new and different kinds of health insurance, small businesses got some breathing room. Millions of small businesses nationwide--an estimated 70% to 80% of small firms that offer employee health insurance--haven't yet faced all the sweeping changes that resulted from the Affordable Care Act. But older policies that were in place before 2014 will ultimately be phased out. In this session, we will look at the changes that have taken place so far under the ACA, and the healthcare issues businesses will consider going forward.

**Tue July 28** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 4D

**Speaker:** Lisa Zamosky (Health Journalist & Author, Lisa Zamosky)

### **MM-102: Sage 100 ERP: Customizer**

To stay competitive, you need your accounting software and business productivity solutions to work together and offer indispensable functions like graphical reporting, integration, customization, and drill-down functionality. Learn more about how to use Customizer to modify Sage 100 ERP screens to work the

way you run your business--even add user-defined fields and modify the user interface--all without programming.

**Tue** 02:30 PM - 03:15 PM CDT

**July 28 Location:** Learning commons 3C

**Speakers:** Steve Passmore (Software Engineer, Principal, Sage), Elliott Pritchard (Software Engineer, Sage), Johnnie Woodward (Sales Engineer, Sage)



**Thu** 02:30 PM - 03:15 PM CDT

**July 30 Location:** Learning commons 2C

**Speakers:** Steve Passmore (Software Engineer, Sage), Elliott Pritchard (Software Engineer, Sage), Johnnie Woodward (Sales Engineer, Sage)

### **MM-121: Automating your estimating and takeoff process**

Gone are the day of digitizer boards and paper plans. Today, best practice in the construction industry is to automate your estimating and takeoff processes so you can bid faster and more accurately. Attend this session to see how your estimators can be more productive and more efficient, easily build and modify estimates, share estimates with colleagues, create professional-looking proposals, and convert estimates easily into budgets once a job has been won.

**Tue July 28** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 4A

**Speaker:** Anthony Merry (Director of Sales, Ledgerwood Associates, Inc)

### **MM-142: Maximizing value from your website**

Today, your website is the face of your business to the world, but is it delivering more than just a pretty face? Are you deriving the maximum value from your website--getting leads, tracking inquiries? Attend this session to learn how you can effectively funnel information from your website directly to different departments in your company. Let your customers self-serve and answer their own questions with an online knowledgebase. Ensure every lead and inquiry is tracked and handled so you can deliver the best possible customer experience.

**Tue July 28** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 4C

**Speaker:** Thomas Nolan (Head of Sage CRM On-Premise, Sage)



### **MM-154: Unlock customer loyalty and increase sales with an e-commerce solution**

We will demonstrate how you can unlock customer loyalty, simplify customer service, and increase sales--all with an easy-to-deploy and -manage web presence for your company

**Tue July 28** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 5A

**Speakers:** Jeffrey Mills (Dir, Product Marketing, Sage), Blair Watkins (Managing Director - CTO, XM Developments)



### **MM-162: Sage 500 ERP: Inventory management in the new millennium**

Customers will learn how to use warehouse automation and warehouse management tools in Sage 500 ERP.

**Tue July 28** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 3B

**Speaker:** Linda Cade (Sr. Product Manager, Sage)

### **MM-202: Sage Fixed Assets: best practices in managing fixed assets--a customer panel discussion**

Join the Sage Fixed Assets customer panel discussion to learn and discuss best practices in fixed asset management from your peers.

**Tue** 02:30 PM - 03:15 PM CDT

**July Location:** Learning commons 4B

**28 Speakers:** Robert Bassett (Dir, Inside Sales, Sage), Kerry Farrington (Manager of Payroll Acctg Svc, GKN North America Services), Carole Garner (System Education Consultant, HCA Healthcare), Grant Griebel (Inside Sales Engineer, Sr, Sage), Armando Lok (Fixed Asset Controls Manager, Tiaa-Cref), Scott Swarts (President, Paragon Systems - FixedAssetExperts)

**MM-211: Expand your capabilities with proven Sage ERP X3 complementary solutions**

With hundreds of solution partners and developers globally, Sage ERP X3 has your business need covered. From CRM to payments, payroll, business intelligence, warehouse management system and much more, Sage ERP X3 offers a breadth of integrated solutions at your disposal. Get an overview of the Sage ERP X3 solution ecosystem and find out which complementary solutions can accelerate the growth of your business.

**Tue** 02:30 PM - 03:15 PM CDT

**July 28 Location:** Grow theater small

**Speakers:** Aida Centelles (product marketing, Sage), Chris Corder (Sr. Product Manager, ISV Mid-Market Ecosystem, Sage), Benoit Le Tohic (Sr. Product Marketing Manager, Sage)

**MM-234: Customizing CRM (hands-on)**

Learn how Sage CRM can be customized by nonprogrammers in order to maximize value for your organization.

**Tue July** 02:30 PM - 03:15 PM CDT

**28 Location:** Interactive learning 2

**Speakers:** Clare Cummins (Manager, Product Management, Sage), Rob Lawson (Field Sales Engineer III, Sage)

**MM-302: Sage business partner: Sage Timeslips database repair (BDE)**

Learn new and innovative ways to address common Sage Timeslips BDE database errors utilizing various data repair tools and utilities. In-depth open forum discussions with partners and Sage Timeslips product specialists.

**Tue July 28** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 1A

**Speaker:** Damen Gadson (Customer support analyst, Sage)

**MM-305: Sage Timeslips eCenter: mobile device solution to better time tracking (bring-your-mobile-device)**

Experience the Sage Timeslips eCenter benefits for tracking your time while on the GO!

**Tue July 28** 02:30 PM - 03:15 PM CDT

**Location:** Interactive learning 3

**Speaker:** James Reese Jr. (Timeslips Product Manager, Sage)

**MM-398: Using Eclipse as a development tool in Sage ERP X3 (hands-on)**

Eclipse is the new tool to debug your development within Sage ERP X3. If you are accustomed to using Visual Studio, join us to learn about Eclipse and explore Eclipse yourself during this hands-on session.

**Tue July** 02:30 PM - 03:15 PM CDT

**28 Location:** Interactive learning 1

**Speakers:** Dominique Bopp (Software evangelist, Sage), Scott Shifko (Professional Services Consultant II, Sage)

**MM-402: Take good construction project communication to the next level with cloud-based project collaboration**

Join us for this product "deep dive" and see first-hand how Sage Bid Management and Sage Construction Project Center support true collaboration among all internal and external project stakeholders. You'll see how mobile access, sharing, and visibility into project documentation help streamline processes throughout preconstruction through all phases of construction and concluding with project closeout/turnover, all resulting in and ensuring successful and profitable projects.

**Tue July 28** 02:30 PM - 03:15 PM CDT

**Location:** Interactive learning 4

**Speaker:** Dennis Stejskal (VP, Strategy and cust retention, Sage)

**PY-166: Tokenization and the future of anytime, anywhere payments**

With the ongoing shift from analog to digital payments and the clear and present danger of data theft, the payments industry is faced with significant challenges when it comes to protecting the integrity of

transactions both online and offline. In this session, experts from Sage Payment Solutions will discuss tokenization as a promising solution, including the status of implementation and adoption by merchants and financial institutions, in delivering the promise of anytime, anywhere payments.

**Tue July 28** 02:30 PM - 03:15 PM CDT  
**Location:** Profit theater small  
**Speakers:** Robert Bertke (SVP, RD, Sage), Joseph Smutz (Dir, Product Integration, Sage)



### **PY-177: Sage 50 payment integration**

Manage and grow your world of commerce from a single platform. Easily move beyond basic card processing to handle advanced capabilities like integration, reporting, and global payments. Join us as we demo Sage 50 and Sage Payments integration.

**Tue July 28** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 3A  
**Speaker:** Jon Zimmermann (Product Mgr, Sr, Sage)

### **PY-186: Small business payments in 2016: what you should worry about and what can be ignored**

Karen Webster, president of PYMNTS.com and CEO of Market Platform Dynamics, outlines the pressing concerns in the payments ecosystems for SMBs. In a discussion that profiles this year's trending challenges and identifies 2016's, Karen will separate the legitimate concerns from the hype.

**Tue July 28** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 5D  
**Speaker:** Karen Webster (President of PYMNTS.com, CEO of Market Platform Dynamics, Market Platform Dynamics)

### **SA-35: For accountants-bookkeepers in public practice and Sage business partners: I am in the cloud--now what?**

This session is dedicated to accounting professionals who are in the cloud with products such as Sage One and are looking for what is next. By having client data stored in the cloud, you have anywhere, anytime access to it. With the adoption of cloud technologies, the opportunity to provide more strategic advice is created. The big question becomes--how can this be done?" We'll discuss how Sage View makes data capture more efficient and how Sage View turns this data into actionable advice that makes you a more valued advisor to your clients.

**Tue July 28** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 2A  
**Speakers:** Gary Olynik, CPA, CMA (Accountant Advocate, Sage Accountant Solutions, Sage), Laurie Rodriguez, CSPO (Sr. Product Manager, Sage Accountant Solutions, Sage)

### **SA-44: For accountants-bookkeepers in public practice and Sage business partners: Using Sage One to grow your practice**

There's a great chance you'd like to bring more clients into your practice, or at least more profitable clients. In this session you'll learn how to use Sage One as a springboard to grow your business. We'll highlight all the ways Sage can help your market your services to small business clients to help you reach your goals.

**Tue July 28** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 2B  
**Speaker:** Erin Thompson (Marketing Manager, Sage Accountant Solutions, Sage)

### **SA-55: Shoebox to toolbox**

The marketplace that we bookkeepers have known is changing rapidly and evolving from the traditional shoebox into automated workflow methods that may be unfamiliar. Are you feeling the urgency to move your bookkeeping business to a model that can grow with these changes and position it for higher profits and sustainability in spite of more automation? Come and join us as we explore the opportunities available to you, such as bookkeeping in the cloud, integrating new technologies, and the concept of "going paperless." There are many decisions to be made and many puzzle pieces to examine. At this session Dianne and Marge will speak from the battlefields with rational steps to accomplishing new tools, new services, and new revenue.

**Tue July 28** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 5B  
**Speakers:** Dianne Mueller (Owner, Soma Small Business Solutions), Marge Wegren-Debre (Certified Consultant Trainer, P51 Computing Strategies)

**Thu July 30** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 2B  
**Speakers:** Dianne Mueller (Owner, Soma Small Business Solutions), Marge Wegren-Debre (Certified Consultant Trainer, P51 Computing Strategies)


### **SA-56: Excel gurus toolbox**

Beyond PivotTables, which many users consider Excel's most powerful feature, Excel has many other great features and add-ins. In this session, you will examine the top Excel features and add-ins to make you more productive. Examples include Fuzzy Lookup, Analysis ToolPak, ActiveData, Conditional Formatting, Evaluate Formula, Custom Views, the Camera, Slicers, Sparklines, top hot keys, and much more. This is a must-see session if you want to improve your Excel skills.

**Tue July 28** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 2C  
**Speakers:** Latisha Carter (xxx, Sage), Brian Tankersley (Director of Strategic Relationships, K2 Enterprises)

### **SB-182: Sage 50--U.S. Edition financial reports for the bookkeeper and office manager**

Get more out of the information you put in. Dashboards, lists, and management centers give you high-level insight, then dig deeper with general ledger reports and financial statements.

**Tue July 28** 02:30 PM - 03:15 PM CDT  
**Location:** Interactive learning 5  Full  
**Speaker:** Antonio Soeiro (Account Manager, Sage)

### **SB-220: Who is the gal with the pocket protector?**

The thought of engaging with an accountant can be overwhelming if you are in the startup phase of your business. However, an accountant can quickly become your best friend. Learn why you should start a relationship with an accountant from day one, how to find one who matches your business goals, and the importance of how one can help shape the future of your business.

**Tue July 28** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 5C  
**Speaker:** Geni Whitehouse, CPA.CITP, CSPM (Countess of Communication, Even a Nerd Can be Heard)

### **SB-231: For Accountants-Bookkeepers in public practice: Pedal to the metal on cash flow**

We've done some research to understand the major factors that are affecting cash flow for small and medium sized businesses today. Learn about what we found and what actions you and your clients can take to move towards having a healthier cash flow.

**Tue July 28** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 1B  
**Speaker:** Keith Arkle (Product Marketing Mgr, Sr, Sage)

### **SP-108: Is your CAPA process in place?**

A corrective and preventive action (CAPA) plan is a must-have in today's compliance-heavy market. In this session, NexTec will show you how to leverage Sage ERP X3 to manage and have full traceability for your corrective and preventative actions throughout your enterprise.

**Tue July 28** 02:30 PM - 03:15 PM CDT  
**Location:** Sponsor theater A  
**Speakers:** Bill Newcomer (Sage ERP X3 Solutions Architect, Nextec), Chris Williamson (General Manager, Nextec)

### **SP-111: Barcoding 101**

In this session we will cover the basics of using barcodes to better track inventory through distribution and manufacturing transactions. Get a better understanding of how barcodes can help your organization better

track inventory levels and speed up your operations with true visibility on what is happening in your warehouse.

**Tue July 28** 02:30 PM - 03:15 PM CDT  
**Location:** Sponsor theater B

**Speakers:** Joe Bisaha (President, JDB Solutions Group), Cody Smith (Director of Sales, Scanco)



### **SP-129: No holds barred: exploring the good, bad, and ugly between marketing and finance**

Marketing and finance both want their organization to be successful. But they don't always agree on the path. In this session, the Sage EVP of Marketing and Domo's CFO will take the stage to ask each other a series of loaded questions—giving attendees unfiltered insight into how each side thinks, what each side wants, and how to align for unprecedented success. It's an informative showdown you won't want to miss—applicable to any role in the organization.

**Tue July 28** 02:30 PM - 03:15 PM CDT

**Location:** Differentiate theater large

**Speakers:** Gabrielle Boko (EVP, Marketing, Sage), Bruce Felt (CFO, DOMO)

### **TL-114: What is at stake for the global economy**

John Lipsky's leadership at the IMF informs a unique perspective on the challenges facing the global economy—and on the unprecedented efforts under way to confront them. He discusses the prospects for successful international cooperation and the risks to the economy and to financial markets that would result from failure.

**Tue July 28** 02:30 PM - 03:15 PM CDT

**Location:** Grow theater large

**Speaker:** John Lipsky (First Deputy Managing Director, International Monetary Fund)

### **TL-115: Understanding financial literacy with TV's The Cupcake Girls**

Owning a small business isn't just about the services you provide or the product you take to market. With Heather and Lori of TV's "The Cupcake Girls," learn firsthand the importance of growing your financial literacy from the get-go.

**Tue July 28** 02:30 PM - 03:15 PM CDT

**Location:** Profit theater large

**Speaker:** The Cupcake Girls (Founders, Cupcakes by Heather & Lori)

### **TL-116: You've been hacked! Now what?**

"There are two kinds of companies . . . those who've been hacked and those who don't know they've been hacked"--James Comey, FBI director. Breaches have hit the White House, the largest banks, top hospitals, retailers, and even the U.S. Postal Service. Forty-four percent of small business reported having been hacked, according to the National Small Business Association. This session teaches how to limit the likelihood of breach and tackle the ever-growing threat of cybersecurity and how to deal with the challenges with liability and recovery.

**Tue July 28** 02:30 PM - 03:15 PM CDT

**Location:** Differentiate theater small

**Speaker:** Bob Oster (Owner, nSpire Technologies)

### **TL-117: The 8-hour MBA in 30-minutes--adding value**

If you don't have the time to complete an MBA degree but still want to understand the key concepts then this course is for you. This course is designed for managers, professionals, and business owners who want to develop a broad perspective to deal more effectively in today's rapidly changing and increasingly complex business environment. Objectives: Participants will gain a high-level but thorough understanding of the key elements and components of a traditional MBA, learn to look strategically at an organization from a holistic perspective to improve business planning and decision making, and understand how different business processes drive results. Topic for traditionalists: financial analysis

**Tue July 28** 02:30 PM - 03:15 PM CDT


**Location:** Lead theater small


**Speaker:** Peter Margaritis (Chief "Edutainment" Officer, Peter A. Margaritis, LLC)



### **TL-201: Fireside chat with Stephen Kelly, CEO, Sage, and Justin Packshaw**

Sage CEO, Stephen Kelly talks to Justin Packshaw about his extraordinary life as a modern day explorer, philanthropist, and entrepreneur, in particular, looking at valuable lessons that can be applied to our business that he has learned through pushing himself and others successfully in extreme environments.

**Tue July 28** 02:30 PM - 03:15 PM CDT  Multi-part  
**Location:** Lead theater large

**Wed July 29** 02:30 PM - 03:15 PM CDT  Multi-part  
**Location:** Lead theater large

### **CS-102: Doing well by doing good: three organizations discuss corporate responsibility**

Representatives from three organizations will discuss how they take corporate social responsibility seriously and how you can integrate philanthropy and volunteerism into your company culture to better serve your employees, your customers, and your community. Don't miss this motivating and inspiring session!

**Tue July 28** 03:30 PM - 04:15 PM CDT  Full  
**Location:** Customer theater  
**Speakers:** Ravinder Bhalwal (Director of Finance, Sofina Foods/Santa Maria Foods), Ed Kless (Senior Director, Partner Development and Strategy, Sage North America), Dorian Nunez (Speaker, Author, Researcher and Consultant, Omni Nola Group), Douglas Penner (CFO, New Orleans Area Habitat for Humanity)

### **GN-31: Making the move to the next wave of cloud and mobile**

Security, privacy, and compliance are the most common concerns that organizations evaluate when making the move to the cloud. While myths about cloud services would lead businesses to be concerned about the adoption of this transformative approach to computing, the reality is that business leaders can adopt cloud services with confidence. Mobile applications are also greatly enhanced by the cloud by tying data from your business systems to the process-oriented mobile applications for sales and service. Join Sheryl Kingstone, research director at 451 Research, as she describes the opportunity presented by cloud services and mobile, debunks many of the myths associated with private, public, and hybrid cloud options, and presents actionable advice when adopting cloud and mobile services.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Grow theater small  
**Speaker:** Sheryl Kingstone (Research director, 451 Research)

### **HR-9: Why HR matters to your organization**

A company is as good as its employees. We are used to talking about a company as if the organization itself is a person. But an organization does not have ideas, does not give service, and is by itself not efficient or productive. The people in the organization do and are. How we treat our employees and what we invest in our employees has a huge influence on the bottom line. Investing in and managing your human capital has in many cases a larger effect than investments in marketing or R and D.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 4B  
**Speaker:** Mark Butje (Sr Dir, Product Marketing, Sage)

### **MM-105: Automate to work smarter, not harder, and reap the benefits in efficiency and growth**

This panel discussion ties together the various resources to automate and simplify your business processes. Panelists will speak from their experience in working with distributors or manufacturers with the intent to provide insights that may be helpful across many types of businesses.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 2C  
**Speakers:** Greg Brown (President, Tangerine Software), Liz Garnand (Product Marketing Mgr, Sage), Carl Marin (Vice President Sales & Marketing, AccellosOne WMS line), Peter Wolf (President, Azamba)

### **MM-110: Learn more about Sage Enterprise Intelligence reporting for Sage 300 ERP**

Sage Enterprise Intelligence goes beyond the world of spreadsheets and report writers to provide an intuitive, unified view of integrated data from various sources. It enables every business user, executive, and manager to create a view of data that is meaningful to their role and to analyze data with complete drill down, drill through, and slice and dice analytics that simplify the view and use of business intelligence.

**Tue July 28** 03:30 PM - 04:15 PM CDT**Location:** Learning commons 4D**Speaker:** Debbie Hill (Pre-sales engineer, Sage)**MM-125: Improving field productivity in the construction industry**

Strong field productivity is important for any construction business. In this session, we will share what business concerns other Sage customers have about field productivity. Learn how leveraging mobile technology can help your business become more efficient and productive while keeping projects moving on schedule and on budget.

**Tue July 28** 03:30 PM - 04:15 PM CDT**Location:** Learning commons 5A**Speaker:** Jeff Adams (Product Mgr, Sr, Sage)**MM-131: Tracking key performance indicators of a construction company**

How do you know how healthy your company really is? You are working on projects today, but are they delivering profit to the company that you will need tomorrow? Attend this session to learn what's vital to track at your construction company to assess its financial health for the long term and learn what tools you can leverage to help you.

**Tue** 03:30 PM - 04:15 PM CDT**July** **Location:** Learning commons 5C**28** **Speakers:** Joseph Burkett, CCIFP (CFO, Cafco Construction Management), Mary Davolt, CPA (CFO, Englewood Construction, Inc), Agnes Herba (Product Marketing Manager, Sage), Steve Tenney (CFO, Story Construction)**MM-136: Tips for maximizing sales effectiveness**

The more information a salesperson knows about their customer or prospect, the more effective he/she can be. Attend this session to learn how access to customer and prospect information can maximize the effectiveness of sales calls and improve the impression you make on your customers or your prospects. No business wants obstacles to their sales cycles. Learn how to identify and remove bottlenecks in your sales process using CRM and Sage Mobile Sales.

**Tue July 28** 03:30 PM - 04:15 PM CDT**Location:** Learning commons 4A**Speaker:** Bill Levesque (Strategic Acct Mgr, Sage)**MM-171: Sage ERP X3: demand planning for manufacturers**

Material Resource Planning is a key to profitability for manufacturing businesses. Join us learn how Sage ERP X3 can improve material planning using actual and forecasted demand.

**Tue July** 03:30 PM - 04:15 PM CDT**28** **Location:** Learning commons 3B**Speakers:** Timothy Demarest (FSE III, Sage), Allan Fine (Field Sales Engineer, Sage)**MM-179: The constant struggle for regulatory compliance**

Staying compliant is a struggle for many companies. Learn how Sage can help you to stay compliant.

**Tue** 03:30 PM - 04:15 PM CDT**July 28** **Location:** Learning commons 5D**Speakers:** Scott Pope (Field Sales Engineer II, Sage), Tammo Stubbe (Product Marketing Mgr, Sr, Sage), Carl Thompson, CPA (Manager, Fixed Assets, Sage), Mark Wilhelm (director, sales engineering, Avalara)**MM-181: More channels, more customers, and greater need for technology to compete in retail**


Today's retail environment is in a state of evolution. Retailers are becoming more global and are dealing with an increasing amount of sales channels and logistics options. Much of this has been influenced by the increase in the number of retailers that are offering products online. This new business model brings a fresh set of challenges that force retailers to alter the ways in which they do business. Recent Aberdeen research notes that 84% of retailers are currently utilizing an ERP solution, simply relying on this technology as they have in the past is not enough for retailers in the new environment. Rather, top performers must utilize the

technology to support a more collaborative model, one that enables the organization to better work with suppliers and customers to meet customer expectations and take advantage of the new opportunities that have presented themselves. This presentation identifies how leading retailers use more advanced ERP to better manage their extended enterprise.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Differentiate theater large  
**Speaker:** Nick Castellina (Research Director, Business Planning & Execution, Aberdeen Research)

### **MM-210: Is your data more secure in the cloud than on your own premises?**

The new Sage ERP X3 cloud service is made available through Amazon Web Services, the undisputed leader in public cloud infrastructure. With data security a hot topic for companies considering to move their business to the cloud, we're inviting an Amazon Web Services expert to debate the topic with our in-house security expert. They'll explore the dark side of data security and shed light on how cloud computing platforms like Amazon Web Services is vigilantly protecting its customers.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 1B  
**Speakers:** David Rinker (Chief Enterprise Architect, Sage), Locke Truong (Director, Sage)  Full

### **MM-303: Understanding user-defined reporting and bill layout design in Sage Timeslips**

Learn to create useful user-defined reports. Gain a better understanding of how to create and modify bill layouts.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 3C  
**Speaker:** Damen Gadson (Customer support analyst, Sage)

### **MM-386: How to use Sage ERP X3 Fixed Assets (hands-on)**

Sage ERP X3 includes a complete and comprehensive module for managing assets, from purchase or production through to end of life and disposal. This session will explore the functionality of the Fixed Assets application and how the Fixed Assets module in Sage ERP X3 can help provide a more complete ERP system for your organization.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Interactive learning 1  
**Speaker:** Gerald Brown (Trainer, Sage)

### **MM-412: The story of Sage Live: It started with a big idea to help reimagine small business**

Sage has been helping small and mid-sized businesses for over 30 years. For emerging and established businesses everywhere, the idea that "time is money" has never been more true. Immediacy matters because opportunities don't wait. That's what Sage Live is all about—and why Sage and Salesforce.com have joined to deliver the real-time financial and operational data businesspeople need in the crucial moments that matter. Come join our Sage executive team to get the scoop on how and why Sage in partnership with Salesforce is reimagining the way small business will work.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Lead theater small  
**Speakers:** Douglas LaBahn (Product Marketing Sage Life, Sage), Santiago Solanas Ruiz (Chief Marketing Officer, Sage), Klaus-Michael Vogelberg (Group Chief Technology Officer, Sage)

### **PR-154: Transforming employee life-cycle management from paper to the cloud**

Learn how leveraging cloud-based HR solutions will bring a more holistic, consistent, and pleasing workforce experience. Join us as we walk through the employee life-cycle from recruit to retire with a showcase on performance management, recruiting, talent management, and much more.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 4C  
**Speaker:** LaDonna Lewis, CCP (Product manager, HCM, Sage)

**Thu July 30** 03:30 PM - 04:15 PM CDT  
**Location:** Lead theater small  
**Speaker:** LaDonna Lewis, CCP (Product manager, HCM, Sage)

**PR-166: Guided payroll setup: empowering customers and streamlining company onboarding**

Does the thought of finding time to sign up for payroll services make you cringe? Come see how simple it is to set up your payroll account, when and where it's convenient for you, with our new guided payroll setup tool.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 2B

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 2A


**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 2A

**Thu July 30** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 2A

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 2A

**PY-167: North American integrated payments**

Payments processing can be expensive and complex. In this learning session, Sage Payment Solutions will demonstrate our simple and integrated solutions that allow small and medium-sized businesses to accept multiple payment types --from the store, online, phone or at a customer's location--then view all payment activity using a simple, real-time dashboard.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Interactive learning 4  Full  
**Speaker:** Jon Zimmermann (Product Mgr, Sr, Sage)


**SB-176: Get more customers and make more sales with tools in Sage 50--U.S. Edition**

All your customer and product information is already in your software. Use the built-in tools in Sage 50 to spot new opportunities, increase your average ticket, and drive more sales.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 1A  
**Speaker:** Shari Willman (Product Marketing Mgr., Sage)

**SB-222: What comes first--the chicken or the egg?**

So you are starting a new business and you have made it through the typical startup questions every business has. What lesser-known things should you be asking that are not on your list? These are the questions usually left unanswered that are equally as important as getting a business license, phone number, and location. We will discuss how these can affect your small business venture.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 5B  Full  
**Speaker:** Kangelon Dexter (Sr. Product Marketing Manager, Sage)

**SB-241: The hidden gem: Sage 50 Time and Billing**

Get ready to explore the full magnitude of Time and Billing within Sage 50. Many users and consultants haven't had experience using Sage Timeslips or explored how the time-tracking features in Sage 50 can be used to invoice a customer, track a service, pay an employee, and track against a project. Come and learn how this gem does it all for service-based businesses.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 3A  
**Speaker:** Fanny Laguna (Trainer, Sage)

**SP-104: Field of dreams: making your next software investment right**

This interactive workshop will give you the tools and experience in making your next software purchase on that delivers the highest possibility of ROI.

**Tue July 28** 03:30 PM - 04:15 PM CDT  
**Location:** Sponsor theater B  
**Speaker:** Don Martin (Sales Manager, Website Pipeline)

**SP-109: Track products from start to finish**

Powerful automatic identification functionality can dramatically lessen the impact a recall has on your business. Join this session by NexTec to learn how to trace the exact path of your stock with Sage ERP X3, ADC, barcode, and RFID technology. Learn how automation can greatly reduce data gathering costs and leverage Sage ERP X3 functionality you already own.

**Tue** 03:30 PM - 04:15 PM CDT

**July 28 Location:** Sponsor theater A

**Speakers:** Chris Esposito (Manager, Technical Services, Nextec), Bill Newcomer (Sage ERP X3 Solutions Architect, Nextec), Jack Romaine (CEO and Founder, Element ID)

**TL-103: Seven steps for moving to the cloud without creating a tornado**

Are you planning to move your applications and data to the cloud but you're afraid of creating a disaster? Deciding to move to the cloud is the first step, but then what? How many "connected" systems need to be moved and in what order? If you move the accounting software, what about the payroll, the merchant accounts, the e-commerce, and all of the other business processes? It's critical that you plan the transition carefully and this session will give you a seven-step checklist to avoid creating a tornado.

**Tue July 28** 03:30 PM - 04:15 PM CDT

**Location:** Differentiate theater small

**Speaker:** Doug Sleeter (Founder, The Sleeter Group)

**TL-106: The committed life: What it takes to succeed in small business and small firms**

To be successful, first you have to define what it means. That can be different for anyone. This session led by Seth David and will cover the following: If you can become more tomorrow compared with today then you can be successful. Does success mean happiness? Does happiness mean success? What is the real key to success? Which comes first, the money or doing what you love? What do you enjoy doing, and how do you make money doing it? Where's your passion? How do you grow a business in today's world? Keeping and building on what you have by giving it away. The committed life: what are you willing to give up in exchange for what you want? Where do ideas come from? How do you reach people? Evolution: I didn't want the same things when I started that I want now. The ultimate secret to success in three words.

**Tue July 28** 03:30 PM - 04:15 PM CDT

**Location:** Profit theater small

**Speaker:** Seth David (Dean of Beans, schoolofbookkeeping.com)

**TL-120: Loyalty loop: the power to differentiate. How little things add up to big business!**

We spend a lot of time telling our clients how different we are. But conduct an online search for the products and services you provide and you'll quickly find that you and your competitors all sound the same. It's time we stop telling people we're different. Start showing them you're different. It turns out one of the most effective ways to grow your business isn't filling a funnel with low-quality leads. Instead, treat your loyal customers as your most valuable asset. It's time to exploit your loyalty loop. The loyalty loop leverages your existing clients and customers to drive a steady stream of highly valuable, high-margin, new business. In this exhilarating talk, best-selling author and marketing guru Andrew Davis will help you harness the power of the new consumer journey. You'll learn how to build anticipation, harness the honeymoon period, and drive inspirational moments that result in new business. You'll leave inspired to rethink the way you win over new customers and transform the way you service the clients you already own. Are you ready to embrace the loyalty loop?

**Tue July 28** 03:30 PM - 04:15 PM CDT

**Location:** Profit theater large

**Speaker:** Andrew Davis (Best-selling author and marketing speaker, Monumental Shift)

**TL-141: Capitalizing on global and regional integration**

The world is growing smaller, as powerful forces, political and economic, speed the globalization of markets. On the economic side, technology is the driver: The relative cost of ocean, air, and road transportation continues to fall, removing an obstacle to cross-border merchandise transactions, while the revolution in information and communications has had, if anything, an even more dramatic impact on trade in services. The improved availability of information and declining transaction costs has further stimulated international flows of capital, labor, and technology. New technologies are fueling the potential of global innovation. Businesses that understand this will capitalize on new technologies, capturing a strategic advantage from streamlined operations and cost and redefined business models. Markets that were once available to only local or regional business are now open to global competition. Businesses small to large

are no longer restricted by geography, only by access to your communications tools and business applications.

**Tue July 28** 03:30 PM - 04:15 PM CDT

**Location:** Grow theater large

**Speaker:** Timothy Ringgold (High Caliber Leader, and Strategist)

### **TL-150: Affordable Care Act: a year in the rearview mirror and what's next**

In recent years, as millions of individual consumers coped with new and different kinds of health insurance, small businesses got some breathing room. Millions of small businesses nationwide--an estimated 70% to 80% of small firms that offer employee health insurance--haven't yet faced all the sweeping changes that resulted from the Affordable Care Act. But older policies that were in place before 2014 will ultimately be phased out. In this session, we'll look at the changes that have taken place so far under the ACA, and the healthcare issues businesses will consider going forward.

**Tue July 28** 03:30 PM - 04:15 PM CDT

**Location:** Lead theater large

**Speaker:** Lisa Zamosky (Healthcare Business Columnist, Los Angeles Times)

### **CS-103: Women in business: power, passion, and profitability**

The workplace is still unequal, but according to InpowerWomen.com, gender equality in the workplace is better than it's ever been. Thirty-five percent of directors, 27 percent of vice presidents, 24 percent of senior vice presidents, and 19 percent of c-level executives are women. In this lively session, you'll hear from female business owners and executives who have navigated the small and medium business landscape and come out on top. You'll hear about their struggles and how they overcame them, and take home tips and resource ideas for being more successful.

**Tue** 04:30 PM - 05:15 PM CDT

**July** **Location:** Customer theater

**28** **Speakers:** Christina Daves (Founder, CastMedic Designs & PR for Anyone), Lori Joyce (Co-founder, Cupcakes & The Cupcake Girls), Laura Leites (Founder and Producer, Womancon), Rieva Lesonsky (Founder and CEO, GrowBiz Media), Heather White (Co-founder, Cupcakes & The Cupcake Girls)



### **GN-27: Measuring what matters**

Do your performance metrics reflect what's truly important to your customers? This session explores the ways companies can increase financial performance by changing from inwardly facing measurements to measurements that extend outside the firm. Changing these metrics often requires firms to think differently than they have in the past. If you're ready to think differently about your company's measurement systems (or think you might be ready to think differently), join this conversational session facilitated by Ed Kless.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 5D

**Speaker:** Edward Kless (Consultant, Sage)



### **HR-10: Compliance: Embrace employee analytics and stop rolling the dice**

Learn the importance of compliance and why time and effort spent becoming compliant can save your company costly fines.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 4A

**Speaker:** Clay Stauffer (Trainer/Curriculum Designer, Sage)

### **MM-113: Are you leveraging all the reporting capabilities in your Sage ERP 300 and 500?**

You have many reporting capabilities within your Sage ERP 300 and Sage ERP 500, plus other reporting solutions that can integrate with your Sage ERP. Learn more about what you already have built in and what could be best for your business needs. In this session, we'll cover Business Insights Explorer, SAP Crystal Reports, and Sage business intelligence solutions.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 3C

**Speaker:** Rob Lawson (Field Sales Engineer III, Sage)



### **MM-124: Risky business: how do you manage subcontractor compliance?**

Managing vendor and subcontractor compliance is complex and can have major financial consequences if not done well. Learn how Sage can help you navigate through the muddy waters of compliance and ensure your subcontractors and vendors don't create risk or liability for you.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Interactive learning 4

**Speaker:** Jeff Adams (Product Mgr, Sr, Sage)

### **MM-130: Manage your complex construction payroll**

Construction payroll goes way beyond regular payroll. You have complex reporting requirements and need to adhere to complex governmental regulations. Attend this session to learn how a construction-specific payroll can help you with your complex construction payroll needs.

**Tue** 04:30 PM - 05:15 PM CDT

**July** **Location:** Learning commons 3B

**28** **Speakers:** Mary Davolt, CPA (CFO, Englewood Construction, Inc), Agnes Herba (Product Marketing Manager, Sage), Joselin Martin, CCIFP (Chief Financial Officer, Hayles and Howe, Inc.), Dawn Naisbitt (Accounting, R O Construction)

### **MM-137: How to excel at email marketing, marketing automation**

Attend this session to understand the ways you can make the most effective use of email marketing and marketing automation in your business. Avoid the most common mistakes or learn how to easily correct them. Learn what tools can help you deploy, manage, refine, and measure your email marketing campaigns.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 4C

**Speaker:** Danny Estrada (CRM Practice Director, Net@Work)



### **MM-166: Sage Inventory Advisor for manufacturers**

We'll show you Sage Inventory Advisor, which gives manufacturers an a effective tool to handle the complexities of your inventory and bill of materials requirements.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 2C

**Speaker:** Andrew Hiscox, Mr (Managing Director, Netstock Australia Pty Ltd)

### **MM-176: Hear how your peers got paid faster with Sage Payment Solutions**

We're going to bust the myth that accepting payments such as credit cards or ACH is not applicable to your business because you sell only to business or your invoices are too large or it will cost you too much. Attend this session to learn how payments can help your business and see how other B to B customers are making payment work for them.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 5A

**Speaker:** Geoff Cox (Dir, business development - SPS, Sage)

### **MM-237: Sage 500 ERP: Data Import Manager from A to Z**

Tired of manually entering data or manipulating data from a supporting system to record the results in Sage 500 ERP? Come learn the tips and tricks to maximizing your efforts using Data Import Manager.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Interactive learning 5

**Speaker:** Darrick Coles (Dir, RD, Sage)



### **MM-301: Sage business partner: Sage Timeslips 2016 database introduction (Firebird)**

Gain more insight and knowledge around the Sage Timeslips database platform transition. Explore the back-end operational flow and repair of the new Firebird database. You'll hear in-depth open forum discussions with partners and Sage Timeslips product specialists.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 1A

**Speaker:** Damen Gadson (Customer support analyst, Sage)

**PR-161: Outsourced payroll--is it right for your organization?**

Tired of worrying about keeping track of filing and paying your payroll taxes on time? Stay in compliance and get protection from fines and penalties with Sage Payroll Solutions. See how easy it is to stay in control of your finances while taking the burden out of payroll management.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Lead theater small

**Speaker:** Vickie Sorokin (Vice President of Sales, Sage)

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 5A

**Speaker:** Vickie Sorokin (Vice President of Sales, Sage)

**PY-168: Business intelligence for the SMB**

Merchants now have the opportunity to leverage payments data to gain insights into making more informed business decisions. This session will discuss how you can monitor your most important business metrics, engage with your best customers, and compare your business to competitors, all in one dashboard.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 4B

**Speaker:** Thomas Savage (Principal-MasterCard Advisors, MasterCard)

**SA-36: Cloud is not the future . . . it's right now. Get there with Sage One.**

Do you need help convincing your clients on why Sage One is the right solution for their business and why moving to the cloud can help them operate more effectively? For many of your clients, moving to the cloud is a no-brainer. However, many are still reluctant to do so. In this session, we will provide you with the tools to make the move to the cloud and to identify the clients to bring with you first.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 2A

**Speaker:** Erin Thompson (Marketing Manager, Sage Accountant Solutions, Sage)



Full

**SA-41: For accountants-bookkeepers in public practice and Sage business partners: Monetizing data through a tiered pricing model with Sage View**

You have captured client data; now what? Through a structured value pricing model, you can turn your client data into value by providing tiered levels of advice. The level of detail you give to clients is based on what they want to pay. In this session, you will learn how to use Sage View in order to tier your services and turn client data into actionable advice based on the tier the client is willing to pay for.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 1B

**Speakers:** Gary Olynik, CPA, CMA (Accountant Advocate, Sage Accountant Solutions, Sage), Laurie Rodriguez, CSPO (Sr. Product Manager, Sage Accountant Solutions, Sage)

**SA-57: Power up your PivotTables**

PivotTables have never been easier to build than they are in the latest versions of Excel. But how do you handle calculated fields and calculated items, data grouping, simple data summaries, special "show values as" data summaries, noncalendar fiscal years, or 4-4-5 calendar periods? What problems does the Excel Data Model present to experienced PivotTable users, and how do you work around these problems? Get these answers and more in this session. Content assumes that participants are already using basic PivotTables and are looking for intermediate to advanced techniques to solve specific problems.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 4D

**Speaker:** Brian Tankersley (Director of Strategic Relationships, K2 Enterprises)



Full

**SB-181: Extend the power of Sage 50--U.S. Edition with these integrated add-ons**

Get more value with less effort. Take advantage of these powerful add-on solutions that work right inside your software.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 3A

**Speaker:** Jamie Smith (Sr. Customer Support Analyst, Sage)

**SP-122: Point of commerce and the future of distribution**

In this session we will bring you up to date on the evolving trends in distribution and retail and the relationship between you and your customers. Learn why point of commerce systems will evolve and ultimately become the way that all businesses interact with their customers.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Sponsor theater A

**Speaker:** Gerry Audell (President, Orion Digital)

**SP-125: Managing customer and internal projects efficiently and profitably--every time!**

Do customer or internal projects often go out of control? Are they either over budget or late? Are you making money or losing money? Are you easily able to allocate the right staff to the right work? Are your customers happy? Can you get accurate invoices out the door in a timely manner without lots of aggravation? Come to this presentation to learn about managing projects and how to do it more easily using various Sage tools. Learn the different factors that are most important when managing a project. Doing business profitably should not be difficult; the secret to success is to optimize each stage of your project. Cut costs that burden your profits, improve your billing cycle, and obtain efficiencies by increasing visibility among staff. Mark Engelberg, CEO of TimeLinx Software, Inc., a Boston area-based publisher of project and service management software solutions, shares his 35 years of rich experience in managing and delivering over 500 projects. Get experienced insights and practical advice into managing issues like revenue leakage, sales-service misalignment, capacity planning, communication, integration, and much more.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Sponsor theater B

**Speaker:** Mark Engelberg (CEO, TimeLinx Software)

**TL-102: Haters gonna hate: branding, marketing and addressing good and bad reviews on social media**

What should you do with those pesky social media haters? Should you ignore them? Be diplomatic? Fight them? Sue them? This session will break it all down for you and give you effective strategies to manage the haters on your social channels.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Lead theater large

**Speakers:** Evan Carmichael (Entrepreneurial, Expert), Lesli Harris (Attorney at Law, Stone Pigman Walther Wittmann)

**TL-121: Analyzing your business for growth**

Do you know what the key drivers are in your business for growth? In this session, you will learn about analytical tools that you can use to position your company for profitable growth. Don't make the mistake of just growing your top line revenue--many companies get into financial difficulty by growing their top line revenue without understanding the overall impact on the financial health of the business.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Profit theater large

**Speaker:** Tim Wilson (National Industry Partner, BKD National Construction & Real Estate Group)

**TL-123: Using cultural cues to propel your company**

Merriam-Webster's word of the year is "culture," and we'll tell you why. As experts in using culture to propel brands, we will share how you can become a Coll Hunter and use the information to grow your company.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Profit theater small

**Speakers:** Plus Aziz (Cultural Strategist, Peter Mayer Advertising Company), Michelle Edelman (VP of Strategy & Planning, Peter Mayer Advertising Company)

**TL-134: Why mobile, why now? A decision maker's guide to business success**

The most popular session at Sage Summit 2014 is updated with new information and trends in this important 2015 update. You hear about it everywhere, but when it comes to your business, you might be asking yourself: Why mobile, and why now? In this session we will help frame your thought process about mobile technology and how it may be impacting your business and your industry today. This presentation

will provide a lively and provocative look at key issues for mobile and your business such as Apple vs. Android, what legacy ERP/accounting systems tell us about mobile, and why mobile commerce may cannibalize web commerce.

**Tue July 28** 04:30 PM - 05:15 PM CDT

**Location:** Differentiate theater large

**Speaker:** Paul Ziliak (Co-founder, xkzero)

### **TL-155: North America, South/Latin America, Caribbean, EMEA, and Asia Pacific: the dos and don'ts of international expansion**

Expanding beyond your country borders? If technology and the Internet seem to have shrunk our world to being a much smaller place, people, cultural, business practice, and opportunity differences remain, and not knowing about those can make or break your expansion dreams. Come and listen to our panel of experts as they share the dos and don'ts, real-life examples of successes, and lessons learned of your peers venturing into North America, South/Latin America, Caribbean, EMEA, and Asia Pacific.

**Tue** 04:30 PM - 05:15 PM CDT

**July** **Location:** Grow theater large

**28** **Speakers:** Barbara Boldt (Dynamic International Consultant, and Trainer), Timothy Ringgold (High Caliber Leader, and Strategist), Desmond Ryan (International Trainer,, Educator, and Mentor), Anthony Simmons (International Business, Development Expert)

### **CS-106: Legislation and taxes: a speed bump, not a roadblock**

Taxes and government regulations are consistently a top concern for small and medium-sized businesses. Globally and in the U.S., too much legislation and high tax rates pose the greatest obstacles to small business formation and growth. During this informative session, three business leaders from various industries will discuss complying with government legislation, paying taxes, and maintaining compliance with OSHA, EPA, and other important regulations, including international compliance.

**Wed** 11:45 AM - 12:30 PM CDT

**July 29** **Location:** Customer theater

**Speakers:** John Babcock (Chief Financial Officer, Satellite Industries), Joselin Martin (Chief Financial Officer, Hayles and Howe, Inc.), Rick Telberg (Founder and Publisher, CPA Trendlines)

### **GN-25: Creating shared vision in a small business (part 1)**

Have you defined a vision for your company and shared it with your teams? A shared vision enlists others in the work and provides guiding principles for day-to-day activities. Creating a shared vision can be hard work because it requires you to examine goals and beliefs and weave them into a cohesive picture of your future. If you're ready to start this work on behalf of your organization, join Ed Kless to make this part of your 2015 action plan.

**Wed July 29** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 4C



Full

**Speaker:** Edward Kless (Consultant, Sage)

### **HR-11: Getting and keeping the right talent**

Make your workforce your biggest asset as opposed to your biggest liability. A study conducted by Bloomberg BNA revealed that attracting and retaining qualified employees is the number-one priority for small and midsized organizations. In this session we will discuss recruitment strategies, talent development strategies, and the power of the engaged employee. We will also address the balance between hard and soft skills and the need for cultural fit with your company.


**Wed July** 11:45 AM - 12:30 PM CDT

**29** **Location:** Learning commons 4B

**Speakers:** Mark Butje (Sr Dir, Product Marketing, Sage), Sean Pomeroy (Top Dog, Visibility Software)


### **MM-112: Sage Enterprise Intelligence--business insight on the move**

Learn how to do more with through visualization, drill down, and through creating the business reports you need using browser or spreadsheet viewing and through mobile devices. Distribute current information to the right people and align your organization to key metrics that you care about.

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 3B  Full  
**Speaker:** Michael Nardini (Product Specialist, Sage)


### **MM-132: Where is the construction industry headed with technology?**

Attend this session to see where contractors are investing time and money in technology.

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 5A  Full  
**Speaker:** Gregg Schoppman (Principal and Florida Consulting Manager, FMI Corporation)


### **MM-135: What is social CRM, and why should it matter to your business?**

Many businesses understand the importance of customer relationship management (CRM). But what is social CRM? In this session, learn the difference between customer relationship management and social CRM and how embracing social media in your business can help make every customer conversation count.

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 5D  Full  
**Speaker:** David Beard (CRM Principal, Sage)

### **MM-159: Ask the experts: everything you always wanted to know about fixed assets management**

Join us for a lively panel discussion about the best practices in fixed asset management, which will be driven by questions from the audience. Let the experts explain how to best manage your asset depreciation and tracking as well as your fixed assets under construction.

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Lead theater small  Full  
**Speakers:** Robert Bassett (Dir, Inside Sales, Sage), Grant Griebel (Inside Sales Engineer, Sr, Sage), Suzanne Pedone (CEO and Founder, Inventory Management Solutions Inc.), Carl Thompson, CPA (Manager, Fixed Assets, Sage), Ann Thorsen (Sage Fixed Assets Product Trainer, Sage)

### **MM-163: Sage 300 ERP: Inventory management in the new millennium**

Customers will learn how to use warehouse automation and warehouse management tools in Sage 300 ERP.

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 4A  Full  
**Speakers:** Andrea Ainslie (Senior Product Manager, Sage), Debbie Hill (Pre-sales engineer, Sage)

### **MM-164: Sage ERP X3: how to improve inventory management**

Sage ERP X3 offers a number of tools to help you better manage your inventory. From better planning to tracking, let us show you how.

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 3C  
**Speaker:** Ian de Leon (Solution Engineer, Sage)

### **MM-184: Sage ERP X3: the road ahead**

In this session, Sage ERP X3 customers will learn where we are headed with Sage ERP X3 and get a feel for both the individual features and the overall focus of upcoming releases.

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 2C  
**Speakers:** Danielle Holt (Director, Product Management, Sage), Jean Huy (VP, Product Marketing, Sage), Bill Rietz (VP, Product Management, Sage)

### **MM-193: Ensuring a successful software implementation for your company**

Any software implementation requires planning, time, and resources to ensure project success. This session will arm you with the critical tools you need to ensure your software implementation is delivered on time and within budget.

**Wed July 29** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 4D

**Speaker:** Dan Cousins (Practice Manager, Dan Cousins and Associates Inc.)

### **MM-203: Using Sage University as a career development tool for your teams**

Did you realize that Sage offers all kinds of training through Sage University? We offer a variety of topics and in multiple formats: live online, recorded, and some classroom. Learn how to use Sage University to manage and track training opportunities for your teams.

**Wed July 29** 11:45 AM - 12:30 PM CDT

**Location:** Differentiate theater small



**Speaker:** Robin DeLeone (Product Mgr, Sr, Sage)

### **MM-221: What is the #1 problem international businesses run into in the United States? Tax compliance**

United States tax policy is some of the most complex in the world. With more than 12,000 jurisdictions, multiple types of tax, and an endless combination of how to charge them, errors are easy, and that opens your business up to hefty fines and penalties. For many international Sage customers, doing business in the United States is made much easier by automating tax compliance right in their Sage ERP. Sage Sales Tax automates the entire transactional tax process, freeing up your time to do what you do best. And it's as easy as turning on the lights.

**Wed July 29** 11:45 AM - 12:30 PM CDT

**Location:** Grow theater small

**Speaker:** Wendy Murray (Field Sales Engineer, Sage)

### **MM-238: Sage 500 ERP: Replenishment and materials source planning with Material Requirements Planning (MRP).**

Every business that sells products has a need to manage stock levels. Manufacturers have unique needs that include timely availability of raw materials, outside processed goods, and shop floor capacity. Join us to learn the ins and outs of MRP.

**Wed July 29** 11:45 AM - 12:30 PM CDT

**Location:** Interactive learning 5

**Speaker:** Linda Cade (Sr. Product Manager, Sage)

### **MM-383: Sage ERP X3 tips and tricks: part 1 (hands-on)**

Sage ERP X3 provides many different navigation and shortcut features to simplify data entry and inquiry for clients. In this session, we will review ways to make working with Sage ERP X3 easier for users, including simple tips for users that can sometimes be forgotten as part of the implementation process. Learn the tips and tricks that will help you become more proficient in your daily processing with Sage ERP X3. Part one of two.

**Wed July 29** 11:45 AM - 12:30 PM CDT

**Location:** Interactive learning 1



**Speaker:** Gerald Brown (Trainer, Sage)

### **PR-157: For accountants-bookkeepers in public practice and Sage business partners: Expanding your services portfolio is the key to attracting and retaining customers**

Businesses today are demanding a one-stop shop for their service needs. Learn how adding integrated Sage accounting products to your payroll solutions will help you attract new customers and will build value and loyalty with your existing customer base.

**Wed July 29** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 1A

**Speaker:** Joel Karczewski (VP, R&D, Sage)


**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 1A

**Speaker:** Joel Karczewski (VP, R&D, Sage)

**PR-167: Product showcase: Sage Payroll Services--the next generation of payroll solutions**

Come and listen to this presentation discussion on Sage Payroll Service's latest platform.

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 2B  Full

**PY-169: Bringing the point of sale out of the storefront**

Mobile technology and the advent of data delivery through wireless platforms are creating opportunities to redefine the physical retail experience. In this panel, experts from Sage Payment Solutions, eMobile POS, and Zuza will discuss how new mobile payment innovations are rapidly changing the face of retail, improving efficiency for small to midsized businesses, and radically evolving the purchase experience.

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Profit theater small  
**Speakers:** Matthew Inan (Director of Business Development and Sales Ops, eMobilePOS), John Laurell (VP, Sage), Todd Metheny (Product Manager, Sage), Danny Mikhail (President and CEO, Zuza)

**SB-177: Choose the best payroll option for your business**

Do-it-yourself? Have someone do it for you? Or find something in between? We'll cover the many payroll options and show you solutions to help save time and protect you from tax penalties.

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 5C  Full  
**Speaker:** Susan Galberaith (Product Marketing Mgr, Prin, Sage)

**SB-242: The best-kept "not so secret" tips and tricks of Sage 50**

There's something for everyone in this session. After years and years of new features, it's hard to stay on top of everything Sage 50 can do. Come to this session and check out some of the best time-saving tricks you may or may not know about.

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Learning commons 3A  
**Speaker:** Alistair Ellis (Product Mgr, Sr, Sage)

**SP-101: Reduce EDI costs and improve vendor scorecard rankings with ERP order integrated EDI and shipping execution featuring a panel of leading manufacturing and distribution executives**

Join Edisoft for this insightful discussion with manufacturers and distributors running Sage ERP solutions (100, 300, 500 and X3). Benefit from insights on high performance strategies to achieve a competitive advantage with Edisoft® ERP Integrated Supply Chain Solutions. Learn how leading Sage ERP users are improving their Supply Chain Performance with the right technology. Gain direct access and answers on how to: Eliminate the re-keying of ERP order and shipment data for increased staff productivity; the re-keying of Fedex, UPS data and LTL data for reduced EDI transaction costs. Track and trace global shipments with Carrier Spend Visibility. Host and moderator, Kelvin Takhar, GM and VP of Sales for Edisoft Inc., will also share valuable insights for both manufacturers and distributors seeking to optimize their Supply Chain by integrating orders and shipments with Sage ERP 100, 300 and X3. Hosted by: Kelvin Takhar, GM and VP of Sales, Edisoft Inc. Panelists: Representatives from leading Manufacturers and Distributors supplying to Wal-mart, Amazon and many other global retailers

**Wed July 29** 11:45 AM - 12:30 PM CDT  
**Location:** Sponsor theater A  
**Speaker:** Kelvin Takhar (Vice President, Sales & Marketing, Edisoft)

**SP-107: Altec's answer to your question of efficiency: Sage ERP Document Management**

Don't have time to deal with outdated practices? Be smart. Adopt software that scans and routes documents, creates alerts, customizes forms, automates workflows, and accesses files from any device! We'll address key vendor considerations, showcase creative ways to expedite processes, and demonstrate Altec's powerful document management and workflow solution, Sage ERP Document Management. You will leave able to identify the best answer for you, where your company needs an efficiency boost, and how to advantageously use existing resources. Go paperless with Sage ERP Document Management in any department, with any process, and anywhere . . .

**Wed July 29** 11:45 AM - 12:30 PM CDT**Location:** Sponsor theater B**Speaker:** Randall Glenn (Senior Sales Engineer, Altec)**TL-113: Profit is sanity**

Join us for an overview of how to define costs, set metrics, and meet profitability goals in a value pricing environment. The session will cover how to define costs without the traditional time approach; how to determine and track KPIs; how to identify profitable clients; how and when to prune unprofitable clients; how to recognize and manage change of scope.

**Wed July 29** 11:45 AM - 12:30 PM CDT**Location:** Profit theater large**Speaker:** Josh Zweig (Co-Founder, LiveCA, LLP)**TL-124: Little changes/big results**

This speech focuses on how making a change in your business does not usually require a big retooling; instead, it's small changes consistently applied that work. Chock full of fun examples, like how John Wooden would teach freshmen the right way to tie their shoe on the first day of basketball practice at UCLA: good shoes = good feet = good posture = better shots.

**Wed July 29** 11:45 AM - 12:30 PM CDT**Location:** Grow theater large**Speaker:** Steve Strauss (Senior USA TODAY, small business columnist)**TL-125: My journey to the cloud and what it means for you**

The personal journey of Paul Donno's move to the cloud, from running a successful accountancy practice for 18 years along with his motivations and challenges over the years. Learn how Paul looks at opportunities and grabs them and the huge (at the time) decision he made to move his accountancy business entirely to the cloud, how he works with lenders, bookkeepers, and clients to service his clients in real time and not historically. How he speeds his processes up and has the information available in a timely way and how he has ditched the time sheet for value added pricing. We'll finish with how he sees accountancy in the future.

**Wed July 29** 11:45 AM - 12:30 PM CDT**Location:** Differentiate theater large**Speaker:** Paul Donno (Director, 1 Accounts Online Limited)**CS-107: Main street NoLa: staying competitive and managing growth**

Did you know that New Orleans is a city made up of small businesses? In fact, there's only one Fortune 500 company based in the New Orleans metropolitan area. This fun session will feature a conversation with executives from three New Orleans institutions: Adler's Jewelry, James H. Cohen and Sons, and Rubenstein's. Combined, these companies have served the city more than 325 years, and their leaders have many great stories to share. You won't want to miss this session!

**Wed** 01:30 PM - 02:15 PM CDT**July 29 Location:** Customer theater**Speakers:** Mickal Adler (Manager, Adler's Jewelry), Steve Cohen (Owner, James H. Cohen and Sons), Jim Pendergast (SVP for Customer Advocacy, Sage North America), Kenny Rubenstein (Owner & General Manager, Rubenstein's)**GN-26: Creating strategy in a small business (part 2)**

Even small organizations can create and execute meaningful strategic plans. Creating a well-defined strategy is hard work and not for everyone, as it requires us to begin to say "no" to stuff we usually say "yes" to. You are hereby invited by facilitator Ed Kless to open a dialogue about how best to go about creating a strategy for your small business organization.

**Wed July 29** 01:30 PM - 02:15 PM CDT**Location:** Learning commons 4C**Speaker:** Edward Kless (Consultant, Sage)**GN-33: Hit the U.S. market!**

Now that you have the best product and the best team, it is time for you to reach out with the market to sell it. Developing the right strategy and go-to-market plan is key to gaining customers. In this session, you

will learn the specificities of the U.S. market and understand how to address it and successfully reach your target.

**Wed July 29** 01:30 PM - 02:15 PM CDT

**Location:** Grow theater large

**Speaker:** Sabine van Egeraat (International Entrepreneur, IBS Global Consulting)

### **HR-12: The changing workforce and you**

Today's workforce is dispersed, tech savvy, multicultural, multigenerational, and ever changing. Can you handle it? Does this translate into a challenge, or does it offer you new opportunities? What are the consequences? How can you prepare your organization, and how should your leadership adapt to the new reality?

**Wed July 29** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 4D

**Speaker:** Mark Butje (Sr Dir, Product Marketing, Sage)

### **MM-111: Sage 50--U.S. Edition Intelligence Reporting: financial workshop (hands-on)**

Learn more about what you already have built into your Sage 50 accounting solution for reporting and what you can do if you combine a familiar Excel application with Sage Intelligence. It gives you better visibility across your business and enables better decision making for a greater competitive edge.

**Wed July 29** 01:30 PM - 02:15 PM CDT

**Location:** Interactive learning 2

**Speaker:** David Ako-Bryant (Intelligence Solutions Specialist, Sage)



Full

### **MM-172: Food and beverage: managing compliance with expanding global regulations**

Increasing regulatory demands placed on food and beverage companies place significant demands on your business. Let us show you how to simplify compliance with these regulations.

**Wed July 29** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 5C

**Speakers:** Timothy Demarest (FSE III, Sage), Allan Fine (Field Sales Engineer, Sage)



Full

### **MM-182: Sage 500 ERP: the road ahead**

In this session Sage 500 ERP customers will learn where we are headed with Sage 500 ERP and get a feel for both the individual features and the overall focus of upcoming releases.

**Wed July 29** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 4B

**Speakers:** Linda Cade (Sr. Product Manager, Sage), Darrick Coles (Dir, RD, Sage)

### **MM-188: Sage 100 ERP: the road ahead**

Attend this session to get a preview of some of the features that will be available in the next release of Sage 100 ERP, along with a few surprises that might be available sooner through product updates.

**Wed July 29** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 2C

**Speakers:** Diane Coffman (Product Owner Business Analyst, Sage), Scott Munro (VP, Product Management, Sage), Deborah Nelson (Product Manager, Sage), Elliott Pritchard (Software Engineer, Sage), Michelle Rowley (Director of Product Marketing, Sage)


**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 4D

**Speakers:** Diane Coffman (Product Owner Business Analyst, Sage), Scott Munro (VP, Product Management, Sage), Deborah Nelson (Product Manager, Sage), Elliott Pritchard (Software Engineer, Sage), Michelle Rowley (Director of Product Marketing, Sage)


### **MM-190: Sage 100 Contractor: the road ahead**

Join us and learn about the vision for Sage 100 Contractor and future roadmap. Get a sneak peek at upcoming Sage 100 Contractor releases.

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 5B  Full  
**Speaker:** Angela Bloomer (Sr. Product Manager, Sage)

### **MM-191: Sage 300 Construction and Real Estate: the road ahead**

Join us and learn about the vision for Sage 300 Construction and Real Estate and future roadmap. Get a sneak peek at upcoming Sage 300 Construction and Real Estate releases.

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 5A  Full  
**Speaker:** Jeff Adams (Product Mgr, Sr, Sage)


### **MM-375: Reporting in Sage Fixed Assets**

Get on the fast track to taking full advantage of the more than 30 powerful reports built in to Sage Fixed Assets--Depreciation. With a variety of features and options in each one, this session will help you gain a understanding of what is available so you can easily select the right report for the analysis you need.

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Interactive learning 4  Full  
**Speaker:** Ann Thornsen (Sage Fixed Assets Product Trainer, Sage)


### **MM-384: Sage ERP X3 tips and tricks: part 2 (hands-on)**

Sage ERP X3 provides many different navigation and shortcut features to simplify data entry and inquiry for clients. In this session, we will review ways to make working with Sage ERP X3 easier for users, including simple tips for users that can sometimes be forgotten as part of the implementation process. Learn the tips and tricks that will help you become more proficient in your daily processing with Sage ERP X3. Part two of two.

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Interactive learning 1  Full  
**Speaker:** Gerald Brown (Trainer, Sage)

### **MM-404: Are you leveraging all the reporting capabilities in your Sage 100?**

You have many reporting capabilities within your Sage 100 ERP, plus other reporting solutions that can integrate with your Sage ERP. Learn more about what you already have built in and what could be best for your business needs. In this session, we'll cover Business Insights Explorer, SAP Crystal Reports, and Sage business intelligence solutions.

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 3C  Full  
**Speaker:** Debbie Hill (Pre-sales engineer, Sage)


### **SA-58: Creating a remote CFO program**

Today's small businesses often have bookkeepers and tax preparers, but they cannot afford (nor need) a full time CFO. Yet the CFO function is a crucial function in any small business, needed to review the Financial Statements, analyze profitability, and improve processes. Explore other benefits that a fractional CFO can provide including analysis of gross margin, pricing, overhead, burn rate, cost allocations, billing rates and more. Learn the value of utilizing a fractional CFO program to review your numbers on a monthly basis.

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Learning commons 4A  
**Speaker:** Leslie Shiner (Owner, The ShinerGroup)

### **SB-179: Budgeting and forecasting tools in Sage 50--U.S. Edition**

It all comes down to cash flow, and Sage 50 has the budgeting and forecasting tools to make you a money-management rock star.

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Interactive learning 5  Full  
**Speaker:** Jamie Smith (Sr. Customer Support Analyst, Sage)

### **SB-225: The ABCs of social media for small businesses**

Learn about benefits of the more popular social media platforms and how they could help your small business thrive. We will share some basic tools that can help you manage your social media platforms as well as some helpful tips and tricks for working social media efforts into an entrepreneurs already busy schedule.

**Wed July 29** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 5D

**Speaker:** Nick Goode (Sage One, Global Leader, Sage)



Full

### **SB-234: For accountants-bookkeepers in public practice: Anywhere you go, your data is right there with you: introduction to Sage Drive**

Tired of USBs? Sick of file transfer services? If you want to embrace a work-from-anywhere lifestyle (or you have customers who want to do the same), Sage Drive is the product for you.

**Wed July 29** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 1B

**Speaker:** Fanny Laguna (Trainer, Sage)

### **SP-105: Phone, fax, and email? Why customers demand more than your outdated customer service**

The world of customer service is trending to be more automated for business-to-business transactions. Is your company ready to offer cloud-based customer self-service?

**Wed July 29** 01:30 PM - 02:15 PM CDT

**Location:** Lead theater small

**Speaker:** Eric Alexander (Co-Founder, Website Pipeline)

### **SP-117: Expert solutions for business**

Product Lifecycle Management using Sage 100 ERP software is a compilation of IIG select enhancements that allow you to manage the entire lifecycle of a product from manufacturing through planning, warehousing, distribution, delivery, field service, and repair, efficiently and cost-effectively, by allowing you to map your business processes into Sage100 ERP.

**Wed July 29** 01:30 PM - 02:15 PM CDT

**Location:** Sponsor theater A

**Speaker:** Alec Baghdasaryan (President/CEO, IIG)

### **SP-121: Benefits of electronic document management availability both inside and outside of Sage ERP X3**

Has chasing paper gotten you down? The V1 EDM solution for Sage ERP X3 is a comprehensive EDM solution that is integrated tightly into the core of Sage ERP X3. With EDM for Sage ERP X3, documents can also be accessed outside of the Sage application from a web-based portal. The interface allows users to search the categories to which they are granted access, and searches can be stored. Everyone across the organization can instantly view the documents they need. During this session, you'll learn how EDM and a centralized document repository can provide easy, secure, and controlled access to documents across your organization.

**Wed July 29** 01:30 PM - 02:15 PM CDT

**Location:** Sponsor theater B

**Speaker:** Jim Fisher (Business Development Manager, V1 Document Management)



Full

### **TL-119: Fraud in the cloud: New risks for a new environment**

Cloud-based applications have changed the way we work, play, and access information. The benefits and risks associated with software-as-a-service (SaaS) and hosted applications are very different from traditional on-premises information technology. Some traditional items used in an on-premises forensic investigation like the transaction audit trail, user access logs, and computer access logs are often difficult to obtain for cloud solutions and may even be unavailable by the time you or your client suspect a crime. Attendees will learn about some of the new risks associated with cloud solutions as well as some techniques which can be used to limit these risks. We'll explain processes surrounding how credit card fraud is perpetrated in the U.S. on a massive scale, and describe how systems were compromised in recent, well-publicized cases. We'll list at least two potential issues associated with a fraud investigation of a cloud-based application. We'll name at least two types of security reviews/audits performed by third parties on cloud data centers.

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Differentiate theater large  
**Speaker:** Brian Tankersley (Director of Strategic Relationships, K2 Enterprises)

### **TL-126: Winning the battle of regulatory compliance**

TBD

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Grow theater small  
**Speaker:** William Gordon (Associate General Counsel and Chief Compliance Officer, Hercules Offshore, Inc.)

### **TL-127: The girl's guide to building a million-dollar business**

Susan Solovic knows better than anyone how to "lean in." She was one of first female executives in a male-dominated Fortune 100 company. She also crashed through the entrepreneurial glass ceiling. Women-owned businesses represent the fastest-growing segment of the U.S. economy. Yet, fewer than 3 percent of these firms gross a million dollars or more in annual revenue. As a small business expert, and the previous owner/founder of a multi-million-dollar company, Susan can teach you how to grow your business.

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Profit theater large  
**Speaker:** Susan Solovic (THE small business, expert)

### **TL-128: Tools we use in the cloud**

Get insight into how an accountancy practice uses the latest tools and apps to ensure it can deliver first-class service in the cloud and be 100% mobile, from social media to tax return filing and integration with Google Apps. We look at how technology has evolved over the years and how clients are working in today's fast-paced mobile world; we will look at Google Sheets, Forms, Drive, Zendesk, dropbox, Sage One, social media, and more including industry-specific applications that can change the accountancy profession and help you get ahead of the competition.

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Differentiate theater small  
**Speaker:** Paul Donno (Director, 1 Accounts Online Limited)

### **TL-129: Defining your brand with the Cupcake Girls**

Heather and Lori, of TVs the Cupcake Girls, know what it means to build a strong brand from the ground up and turn that brand into a nationally recognized (and LOVED!) cupcake franchise. What's the trick? Come to this session and find out.

**Wed July 29** 01:30 PM - 02:15 PM CDT  
**Location:** Lead theater large  
**Speaker:** The Cupcake Girls (Founders, Cupcakes by Heather & Lori)

### **CS-109: What it really means to be "customercentric"**

This panel session, moderated by Wai Au, director of VOC Programs for Sage, will focus on customer experience as an important business driver. How important is listening? How can you get your employees to believe in customer experience and be as passionate about it as you are? You'll learn how to get real-time insights to improve customer service and grow your business through customer loyalty.

**Wed July 29** 02:30 PM - 03:15 PM CDT  
**Location:** Customer theater  
**Speakers:** Wai Au (Director, Voice of the Customer Programs, Sage North America), Nikita Devereaux (CEO, Simply Virtual), Dorien Nunez (Speaker, Author, Researcher and Consultant, Omni Nola Group), Andrew Schuman (President and CEO, Hammond's Candies)

### **HR-13: HR for your ERP**

Every business is a people business. At the heart of every successful business are the people who make things happen. It is your job to attract and retain the very best talent, plus keep current employees as positive and productive as possible. No easy task. Leverage your Sage ERP software to automate, streamline, and extend your human resources processes. Achieve profitable growth and outperform the competition by leveraging your employees skills and talents while giving them every opportunity to achieve their career goals. Learn how Sage HRMS can help you automate employee administration and time

management and confidently process your payroll; Support compliance with changing global and local HR regulations. Your company deserves it. Your employees deserve it.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 4C

**Speaker:** Scott Pope (Field Sales Engineer II, Sage)

### **MM-103: Staying in compliance with the Affordable Care Act (ACA) in 2015 and beyond**

Staying on top of the Affordable Care Act is critical--and challenging--particularly when it comes to your obligations under the law. With all the delays, legislative changes, and shifting regulatory interpretations over the past few years, you may be feeling a little overwhelmed now that 2015 is here. As a trusted expert advising companies around the world for the past 30 years, Sage is ready to help support you through healthcare reform and answer your questions.

**Wed July** 02:30 PM - 03:15 PM CDT

**29** **Location:** Learning commons 4B

**Speakers:** Damian Blurton-Jones (Product Mgr, Sr, Sage), Jennifer Dungan (Dir, Product Management, Sage)



### **MM-126: Get rid of the paper shuffle at your construction company by going paperless**

Are you still routing paper invoices to be approved, wondering where that invoice or important document is in that huge pile on your desk, or walking paper invoices or documents around the office to be approved? Save trees and, more importantly, your time by going paperless. Join us at this session to learn how Sage can help you easily route, store, find, and manage the mountains of paperwork your construction company has on every project with Sage Paperless Construction.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 5A

**Speaker:** Jeff Adams (Product Mgr, Sr, Sage)

### **MM-183: Sage Fixed Assets 2015: tips, tricks, and the road ahead**

Learn the tips and tricks our product experts use to get the most out of Sage Fixed Assets 2015, and find out what is ahead for the product line. Attending this session will make you more be more proficient in using Sage Fixed Assets today, and it will help you understand what the upcoming improvements in Sage Fixed Assets can do for you. Please note that MM-183 and MM-374 are identical session, giving you the opportunity to choose when you want to attend.

**Wed July** 02:30 PM - 03:15 PM CDT

**29** **Location:** Learning commons 4A

**Speakers:** Robert Bassett (Dir, Inside Sales, Sage), Grant Griebel (Inside Sales Engineer, Sr, Sage)



### **MM-185: Happy birthday, Sage 300 Online!**

It was exactly a year ago Sage 300 Online was born. What's been happening since? What does the future of the product look like? How have services, distributors, and others benefited from using it in their business?

**Wed** 02:30 PM - 03:15 PM CDT

**July 29** **Location:** Differentiate theater small

**Speakers:** Tiffany Kuykendall (Senior Director, Sales, Sage), David Rinker (Chief Enterprise Architect, Sage), Michelle Rowley (Director of Product Marketing, Sage)

### **MM-189: Sage Estimating: the road ahead**

Join us and learn about the vision for Sage Estimating and future roadmap. Get a sneak peek at upcoming Sage Estimating releases that are designed to help you win more business.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 5B

**Speaker:** Walt Davis (Strategic account manager, Sage)



### **MM-198: Learn how to improve intelligence with Sage ERP X3**

Join us to learn how the improved intelligence with Sage ERP X3 has helped our customers succeed. Customers will tell their story in this session and answer questions you have.

**Wed July 29** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 5D  
**Speakers:** Randy Bacchus (Solution Engineer, Sage), Ian de Leon (Solution Engineer, Sage)  Full

### **MM-205: Make budgeting and planning a breeze**

Budgeting and planning are keys to running a successful business. Join us to learn how your company can improve this oftentimes manual, tedious process.

**Wed July 29** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 2C  
**Speakers:** Darrick Coles (Dir, RD, Sage), Gary Maher (Strategic Account Manager II, Sage)


### **MM-207: Leveraging inventory replenishment and Sage Inventory Advisor to improve your forecasting**

Do you know that Sage has an inventory advisor product that can improve your ability to forecast inventory needs? Join us to learn how Sage Inventory Advisor and inventory replenishment can work together to improve your forecasting process.

**Wed July 29** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 4D  
**Speaker:** Craig de Kock (VP - Group Operations, NETSTOCK)


### **MM-231: Sage 500 ERP: Do you know what you don't know--distribution features?**

This tips and tricks session lets you explore new features added since the release you are currently using in distribution in a hands-on lab with a Sage expert proctor on hand, plus the experiences of your peers to draw from.

**Wed July 29** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 5C  Full  
**Speaker:** Linda Cade (Sr. Product Manager, Sage)


### **MM-235: Sage CRM e-marketing with MailChimp (hands-on)**

Learn how by using Sage CRM with integrated MailChimp you can create, track, and manage dynamic marketing campaigns that really deliver.

**Wed July 29** 02:30 PM - 03:15 PM CDT  
**Location:** Interactive learning 2  Full  
**Speaker:** Thomas Nolan (Head of Sage CRM On-Premise, Sage)

### **MM-385: Best practices in creating a workflow in Sage ERP X3 (hands-on)**

Wouldn't it be nice to have Sage ERP X3 alert you every time a customer credit level is changed or a special supplier invoice is entered or for something else that is specific to your information needs? Sage ERP X3 has comprehensive workflow functionality that includes the ability to create simple email notifications to alert you when you need it. Attend this session to learn more.

**Wed July 29** 02:30 PM - 03:15 PM CDT  
**Location:** Interactive learning 1  Full  
**Speaker:** Paul Mulcahey (Sr Trainer, Sage)

### **MM-400: When, why, and how to upgrade Sage ERP X3**

Join us to learn more about upgrading to the latest version of Sage ERP X3. During this session, we will cover why you should consider upgrading, when is the right time to upgrade for your business, and how it is easier to upgrade with the latest version of Sage ERP X3.

**Wed July 29** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 3C  
**Speakers:** Mark Battaglia (Mgr, PSG, Sage), Dominique Bopp (Software evangelist, Sage)

### **MM-403: Sage Intelligence for Sage 100, 300, and 500 ERP: financial reporting**

Transform your Sage 100, 300 or 500 ERP data into meaningful information that provides better financial reporting. See up-close demonstrations of best practices for using Sage Intelligence. Get a glimpse of Excel on steroids training and how it enhances users' experience of Sage Intelligence. See what is new with the most the most recent Sage Intelligence release.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 3B



**Speaker:** Sandra Smith (Product specialist, Sage)

### **PY-171: The demise of the checkbook has been greatly exaggerated**

As the world of electronic payments continues to evolve, checkbook still dominate, accounting for as much as 40% of all payments! Everyone wants to talk about credit cards, but what is the merchant supposed to do when his customers want to pay by paper check or ACH? In the session, Sage will discuss how you can grow your revenue by accepting checks and ACH, the various solutions offered, and the safe and secure process for electronic deposits.

**Wed** 02:30 PM - 03:15 PM CDT

**July 29** **Location:** Learning commons 2A

**Speakers:** Chris Brundage (EVP/COO, Check, Sage), Matthew Inan (Director of Business Development and Sales Ops, eMobilePOS), Danny Mikhail (President and CEO, Zuza)

### **PY-176: Sage 50 payments integration: deep dive**

Sage Payments takes your business beyond card processing so you can let customers pay as they please and take advantage of advanced tools that save time. Learn how we can handle all the hard stuff: Sage 50 payment integration, reporting, and PCI compliance so you can focus on what you do best.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Interactive learning 4

**Speakers:** Justin Cosgrove (Trainer, Sage), Tom Nanci (Inside Sales Engineer II, Sage)

### **SA-52: Getting real results with social media marketing for small business**

Have a Facebook page? Twitter account? Google+? Why isn't it working? This talk will show you how to get great results. Whether you wish to become the next Seth David or merely want to find new customers, we'll show you how to build, use,, and leverage social media properly, efficiently. We'll talk about technology, tips and tricks and help you develop some serious skills to brand you and your company and grow revenue.

**Wed July** 02:30 PM - 03:15 PM CDT

**29** **Location:** Learning commons 2B

**Speaker:** Eric Greenspan (Co-Founder/CEO/Chief Clever Officer/Dean of Delight, schoolofbookkeeping.com)



### **SB-184: Manage your employee payroll in Sage 50--U.S. Edition**

It's easier than you think to manage and pay your employees with Sage 50. This session will show you everything you need to know.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Interactive learning 5

**Speaker:** Jamie Smith (Sr. Customer Support Analyst, Sage)

### **SB-224: Back to basics: Expenses and cash flow management with Sage One**

One-third of small businesses fail due to poor financial management. Do you know how much money you have coming in and going out at all times? Learn why you should integrate all of your financials with Sage One so you do not miss anything important. Instantly track incoming invoices and outgoing payments so you know how much money you have on hand. Because if you are not making money, you cannot stay in business.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Grow theater small

**Speaker:** Mike Savory (Global Product Manager, Sage One, Sage)

### **SB-235: For accountants-bookkeepers in public practice: invoicing from the cloud, accounting on the desktop**

Sage 50 Accounting (Canadian Edition) and Sage One now work together. Learn about how this unique combination is helping accountants and bookkeepers across Canada to save time and seize new opportunities for themselves and their clients. If you're already using the integration then this is the perfect session to attend if you'd have any questions or would like to offer feedback.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 1B

**Speaker:** Keith Arkle (Product Marketing Mgr, Sr, Sage)

### **SB-243: Sage 50 Accounting Payroll 101**

New to the world of payroll processing or want to bring this service in-house? It's all in the setup. Join this session and understand the basics of payroll processing, the tax calculator, benefits, and deductions.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 3A

**Speaker:** Fanny Laguna (Trainer, Sage)

### **SP-102: Bar coding and Sage 100 ERP**

Being more efficient is key to any evolving business. Using software and bar codes to automate existing Sage 100 ERP processes is a key dynamic to improving business. Learn about the versatile and easy-to-use and -install bar code solution, ScanForce.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Sponsor theater A

**Speaker:** Steve Showalter (Sales Manager, Scanforce)



Full

### **SP-114: Paperless enterprise: gaining control of business documents and decision processing for Sage 100, 300, and 500 ERP**

Still manually keying invoice details into your Sage ERP system? The time lost in capturing, storing, routing, registering--and sometimes losing--invoices and invoice data is significant. In this session, learn how to capture documents and invoices generated internally and e externally (the options and efficiencies), use workflow approval (the value in automating decision processing in AP and across the enterprise), and access, collaborate, and control (the benefits in immediate retrieval of information) collaborators' visibility and the effects on time, resources, and meeting compliance.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Sponsor theater B

**Speaker:** Mike Share (Channel Manager, ACOM)

### **SP-116: Is your head in the cloud? A business guide to understanding all your options**

What does the cloud really mean in business terms? The term gets used in so many ways, but what you really care about is how it can improve your business. Join Brian Seidel (CEO, Website Pipeline) as he leads a discussion on the virtual galaxy of business software. He dives into where trends are moving, where software categories are colliding, and which ones are being most impacted by cloud applications.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Differentiate theater large

**Speaker:** Brian Seidel (Chief Executive Officer, Website Pipeline)

### **TL-131: Implications of monetary policy of key central banks on financial markets**

Has it been too risky to rely almost entirely on monetary policy to revive the global economy? Having so relied, will the divergence of major economy's monetary settings strain market liquidity in the period ahead? Do we know what the new normal looks like?

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Grow theater large

**Speaker:** Paul Tucker (Former Deputy Governor, Bank of England)

### **TL-132: Profit first: how to make any business highly profitable, by the very next deposit**

The profit formula is simple: Sales – Expense = Profit. The only problem is, it's a lie. In his wildly popular presentation, Mike shows why the formula entrepreneurs use to calculate profit actually inhibits it. He then shares a new approach to profit--taking it first--that instantly changes everything. With this simple yet profound change, any business will become instantly and permanently profitable.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Profit theater large

**Speaker:** Mike Michalowicz (Author, and entrepreneur)

**TL-136: From \$25 to \$185: Power pricing your value pricing--getting paid what you're worth and being liked for it**

The ideal marketing machine is one that is based on inbound marketing. This means people are calling you for your services instead of your calling them. This also means that by the time they call you, the sale is already made, and it means that by the time they call you, they are expecting and happy to pay more for what you are offering because you have established yourself as an authority on your topics in your community. We'll show you how to create massive demand for what you offer so you can write your own ticket and charge customers what you believe is the true value of your products and services. You'll learn the techniques to generate a 24/7 inbound marketing and lead generation engine. Learn how to sell by not selling--building value. Learn how to gain trust and build a community. Learn how to build an online presence without creating the persona of a salesperson. Learn how to balance your presence with being there around the clock and being there in person. Learn how to build confidence, which is 90% of the battle. And learn why you'll do a better job when you charge more.

**Wed July 29** 02:30 PM - 03:15 PM CDT

**Location:** Profit theater small

**Speaker:** Seth David (Dean of Beans, schoolofbookkeeping.com)



Full

**CS-108: Take your business global**

One of the greatest advantages of doing business in a 24/7 global economy is having access to an almost unlimited pool of customers. Small and medium businesses are no longer confined to local markets and there's never been a better time for businesses to explore international opportunities. Business leaders will talk about getting started, understanding and meeting various global requirements, and much more.

**Wed** 03:30 PM - 04:15 PM CDT

**July 29 Location:** Customer theater

**Speakers:** John Babcock (Chief Financial Officer, Satellite Industries), Mike DePasquale (Enterprise Systems Director, Avon Rubber plc), Jaime Navarro (General Manager for N.A., Ticketbis), Jo Ray (UKISG Group Director, Customer Experience, Sage)

**GN-28: Leadership in the age of the quick fix**

Leadership thinking is often based on manipulation; trying to "get someone to do something," which isn't necessarily effective. Coming to terms with this idea is difficult and not for everyone because it requires us to examine some of our most deeply held beliefs and either dismiss them or at least think differently about them. If you are interested in rethinking the way you approach leadership, you are invited to attend this session facilitated by Ed Kless.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 4D

**Speaker:** Edward Kless (Consultant, Sage)

**HR-14: 15 factors to consider when processing payroll**

When changing how you process payroll, there are numerous considerations that must be taken into account. You will want to think about the features that are important to your company and decide on a solution that meets your needs within budget. The key to selecting the right payroll solution for your organization is to make certain that all of the vendors you evaluate can meet your needs before you begin to narrow down your choices. As you gather requirements and create your Request for Proposal (RFP), you will need to consider the functional capabilities required to produce accurate payroll, the vendor qualities you value most, and finally, how you plan to implement a new solution. This session will discuss 15 factors to keep in mind.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 4C

**Speaker:** Damian Blurton-Jones (Product Mgr, Sr, Sage)

**HR-19: Using SAP Crystal Reports with Sage HRMS: Part 1 (hands-on)**

Begin to build SAP Crystal Reports using your Sage HRMS data. This session covers the basics to give you the foundations for building the reports you need from your data.

**Wed July 29** 03:30 PM - 04:15 PM CDT**Location:** Interactive learning 2**Speaker:** Clay Stauffer (Trainer/Curriculum Designer, Sage)**MM-106: Sage ERP X3 Intelligence: financial reporting**

Transform your Sage ERP X3 data into meaningful information that provides better financial intelligence. See up-close demonstrations of best-practices for using Sage Intelligence for flexible financial reporting. Get a glimpse of how the powerful functionality of Microsoft® Excel® enhances the experience of Sage Intelligence. This session is for any Sage ERP X3 customer – those who already use Sage Intelligence or those who are looking to leverage Excel-based capabilities for a flexible financial reporting solution.

**Wed July 29** 03:30 PM - 04:15 PM CDT**Location:** Learning commons 3C**Speakers:** Randy Bacchus (Solution Engineer, Sage), Ellen Callahan (Field Sales Engineer IV, Sage)**MM-128: Still managing job costs, change orders, and subcontracts in spreadsheets?**

If you're managing job costs, change orders, and subcontracts manually or in spreadsheets, you're spending valuable time doing tasks that can easily be automated and vulnerable to errors that could be disastrous to your profit margin. If your accounting or ERP software doesn't manage construction-specific processes, then you need to attend this session to learn how Sage can help you with industry-specific solutions such as Sage 100 Contractor and Sage 300 Construction and Real Estate.

**Wed July 29** 03:30 PM - 04:15 PM CDT**Location:** Learning commons 4A**Speaker:** Dennis Stejskal (VP, Strategy and cust retention, Sage)**MM-139: Delivering customer service in the 21st century**

Customer service is no longer solely being delivered through a call center during normal business hours. Today's customers expect multiple avenues through which to receive assistance 24/7 and 365 days a year. Attend this session to better understand the industry trends for delivering customer service and how you can meet the changing needs of your customers. (include Sage Mobile Service)

**Wed July 29** 03:30 PM - 04:15 PM CDT**Location:** Profit theater small**Speaker:** Danny Estrada (CRM Practice Director, Net@Work)**MM-153: Creating technology change agents in your distribution business**

ERP technology has long aided wholesalers and distributors in their quest for profits, and the new business environment calls for technology that is more collaborative and more predictive and enables enhanced agility. While this new technology requires new skillsets from employees, it is also a key differentiator when attracting new talent. The new breed of business professionals looks to be employed by organizations that utilize technology that is not only on the cusp of technology advancement, but is also clean, intuitive, mobile, and usable. This presentation examines the adoption of social, usable, mobile, predictive, and open solutions in wholesale distribution and notes how organizations can pair this technology with the change agents that they have identified within their organization.

**Wed July 29** 03:30 PM - 04:15 PM CDT**Location:** Differentiate theater large**Speaker:** Nick Castellina (Research Director, Business Planning & Execution, Aberdeen Research)**MM-156: Managing your fixed assets with Sage Fixed Assets and Sage Fixed Assets Online**

Learn how you can easily manage your fixed assets and stay in full regulatory compliance in this live product demo of Sage Fixed Assets and Sage Fixed Assets Online.

**Wed July 29** 03:30 PM - 04:15 PM CDT**Location:** Learning commons 4B**Speaker:** Grant Griebel (Inside Sales Engineer, Sr, Sage)**MM-187: Sage 300 ERP: the road ahead**

Be the first to know what's coming in 2015 and beyond for Sage 300 ERP. In this session our product team will provide you with vital information that will help you to plan for the future of your business. We will

share our product strategy and roadmap with details on upcoming product releases and add-on solutions. Join us to learn about the exciting future of the Sage 300 ERP solution.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 5A



**Speaker:** Andrea Ainslie (Senior Product Manager, Sage)

**Thu July 30** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 4B

**Speaker:** Michelle Rowley (Director of Product Marketing, Sage)

### **MM-401: How to create dashboards in Sage ERP X3 (hands-on)**

Process maps offer easy graphical navigation for users for most functions of Sage ERP X3. In this session, you will learn what process maps are available out of the box and how to create your own process maps to define workflows or assist users with navigating through Sage ERP X3. Attend this session to learn how to design your own process map.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Interactive learning 1



**Speaker:** Gerald Brown (Trainer, Sage)

### **PR-162: Quickly and accurately track employee time on the go with the new Sage Time mobile app (bring-your-mobile-device)**

Take an interactive look at the most effective way to track a mobile workforce. Bring your mobile device to this session and see the power of our cloud-based mobile time solution.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Interactive learning 3



**Speaker:** Greg Javins (Vice President, Sage)

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Interactive learning 3

**Speaker:** Greg Javins (Vice President, Sage)

### **PR-168: Product showcase: Sage Payroll and Sage 50 and Sage 100 GL integration streamlined**

In this session we will provide an overview on real time integration between Sage 50 and Sage 100 and Sage Payroll.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 2A

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 2B

**Thu July 30** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 2B

### **PR-169: Product showcase: HR/HCM**

In this showcase, you will hear about our HR product along with its benefits, capabilities, and overall strategy.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 2B

### **PY-172: Data protection and PCI**

Customer data are buzz words we've been hearing in the news lately, which unfortunately won't be going away anytime soon. It's your responsibility to your customers to keep that information safe. In this session, you'll hear from Sage Payment Solutions on what tools and services can help keep your credit and debit card data current and protected from the bad guys.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 5D

**Speaker:** Robert Bertke (SVP, RD, Sage)

### **PY-178: Sage 100 ERP payment integration: deep dive**

Reduce your burden on the back end. Learn how to automatically route payment information to your Sage 100 solution, saving five minutes of admin time on every transaction.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 3A

**Speakers:** Justin Cosgrove (Trainer, Sage), Tom Nanci (Inside Sales Engineer II, Sage)

**SA-42: For accountants-bookkeepers in public practice and Sage business partners: How providing strategic advisory services through Sage View can benefit clients**

Clients come first. And they are demanding more and more strategic advisory services. Rather than giving them reactive advice based on data you have accumulated over the years, why not provide them with more proactive advice using real-time data that they can use to grow their businesses? This session will go over the benefits that clients receive through strategic advisory services from their accounting professionals through Sage View. This way, you can showcase these benefits to them when promoting your strategic advisory services as a new part of your firms core offerings.

**Wed** 03:30 PM - 04:15 PM CDT

**July 29** **Location:** Learning commons 1B

**Speakers:** Gary Olynik, CPA, CMA (Accountant Advocate, Sage Accountant Solutions, Sage), Laurie Rodriguez, CSPO (Sr. Product Manager, Sage Accountant Solutions, Sage)

**SA-47: The accountant entrepreneur--evolve your business model for maximum growth**

Moving your practice--and your clients--to the cloud is about more than technology. It's a fundamental shift in your business model, a combination of broadening your abilities with today's technology and redesigning your business to maximize growth. There are compelling new business models for accountants who want to take charge of their future. This presentation presents a roadmap to help you tackle new services for new clients, how to select the right vertical market focus, and how to drive success by driving improvements in business processes with your clients.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 5B

**Speaker:** Doug Sleeter (Founder, The Sleeter Group)

**SB-236: Cash flow is not just about money in: expense management solutions from the cloud**

Keeping on top of money going out is a critical component of cash flow management. Make it easier to manage with integrated banking and other cloud features that make expense management a snap for Sage 50 users!

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 5C

**Speaker:** Alistair Ellis (Product Mgr, Sr, Sage)

**SB-244: Sage 50 Accounting Payroll 201**

Sage 50 Accounting has multiple integrated payment solutions that allow for employee direct deposit payments and retirement savings plans. This session covers the bells and whistles that will bring your payroll processing to the next level.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 3B

**Speaker:** Fanny Laguna (Trainer, Sage)

**SP-103: Futureproofing your on-premises Sage ERP**

With the expanding adoption of cloud ERPs and customer-facing solutions, learn how your company can successfully utilize the cloud with your current on-premises Sage ERP. A cloud-based front-office solution will quickly give you the scalability your company needs to get, keep, and grow your customer base without the pain of making an ERP heart transplant.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Differentiate theater small

**Speaker:** Brian Seidel (Chief Executive Officer, Website Pipeline)

**SP-115: BI at Sage Summit: Price vs Power Dilemma Solved**

Many SMB executives face a dilemma when selecting business intelligence and analytics tools: Which matters more, price or power? Low-priced systems tend to be inflexible and anything but intuitive. Higher priced systems make the wait for ROI seem indefinite. What's more, low-powered products leave out data discovery, the new method for finding buried data nuggets. Now, at last, the dilemma has been solved: One powerful self-service BI tool has come onto the market that's priced for mid-sized businesses. Please join our session to learn about DataSelf Analytics: • Easy self-service BI used by CEOs, CFOs, controllers, CIOs, sales, marketing and operations people. Business people consume reports anytime, anywhere. They even create or modify their own reports without IT help. • A massive library of 5,000-plus templates for reports, dashboards, and KPIs. That means value right out of the box. • Rapid-fire data discovery with Tableau — the top-rated Gartner visualization engine — powered by the DataSelf drivetrain and data warehouse. • Reduce labor-intensive reporting by over 80% with automatic refresh and report distribution. • Connects to Sage CRM, Sage 100, Sage 300, Sage 500, Sage Pro ERP, Sage X3 and other systems.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Sponsor theater A



**Speaker:** Joni Girardi (Founder and CEO, Dataself)

### **SP-118: Catch up to the future with Sage ERP Document Management by Altec**

Today's increasingly mobile workforce does not have time to wait for you, nor can they rely on paper. Convolutioned access to documents and no control over day-to-day processes and approvals hinder business productivity. Going paperless is more than saving trees; adopting a document management initiative is about automating age-old paper practices. After this brief presentation, you will walk away more educated about the benefits of document management, ROI of this business automation tactic, ways to leverage Altec's mobile and cloud offerings, and ways to go paperless with Sage ERP Document Management in any department with any process anywhere.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Sponsor theater B

**Speaker:** Doug Tanner (Senior Sales Engineer, Altec)

### **TL-133: The road ahead: state of the global economy in 2016**

Will China overtake the USA as the world's largest economy? Will Russia recover from its economic crisis? Will the Trans-Pacific Partnership create opportunities for U.S.-based companies? Will Greece leave the Eurozone? To these and other questions about the global economy we may simply ask, "Why should small businesses care?" The global economy is still struggling to gain momentum as many high-income countries continue to grapple with legacies of the global financial crisis and emerging economies are less dynamic than in the past. Global growth last year was lower than initially expected and remains sluggish this year. While activity in the United States and the United Kingdom has gathered momentum as labor markets heal and monetary policy remains extremely accommodative, the recovery has been sputtering in the Euro Area and Japan as legacies of the financial crisis linger, intertwined with structural bottlenecks. China, meanwhile, is undergoing a carefully managed slowdown. Disappointing growth in other developing countries in 2014 reflected weak external demand, but also domestic policy tightening, political uncertainties, and supply-side constraints.

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Grow theater large

**Speaker:** Timothy Ringgold (High Caliber Leader, and Strategist)

### **TL-135: CFO alert: revenue recognition update and other important accounting industry trends**

In May of 2014, FASB issued one of the most far-reaching accounting standards ever, Topic 606--Revenue From Contracts With Customers. This new standard will be effective for all companies (public and nonpublic) in the near future. Attend this session to learn the basics of the new standard, along with the timeline and action steps each company should be taking today. In addition, a brief update will be provided on other accounting-related topics.

**Wed** 03:30 PM - 04:15 PM CDT

**July 29** **Location:** Profit theater large

**Speakers:** Jerry Henderson (National Industry Partner, BKD National Manufacturing & Distribution Group), Tim Wilson (National Industry Partner, BKD National Construction & Real Estate Group)

### **TL-137: Learn how Tim Horton's became a marketing giant**

Ron Buist, one of Canada's foremost marketing professionals and now a best-selling business book author, is the former marketing director for Tim Horton's and has launched some of the best-known and most

successful marketing campaigns in Canadian advertising history. In his inspiring presentation, Buist will share how Tim Horton's grew from a single doughnut shop to a multi-billion-dollar international company through out-of-the-box marketing campaigns, initially on a very limited budget. Learn how and why Buist invented the "Roll up the Rim to Win" contest and developed logoed Tim Mug travel mugs. He'll also discuss the 12 points to business success that he employed at Tim Horton's to sell everything from coffee to soup and sandwiches and share how any business can use these ideas to sell more to clients. Experience the original packaging designs, award-winning commercials, and strategies of self-promotion that are based on the one thing in business that can be guaranteed: the changing customer! Come, learn, enjoy, and bring a coffee!

**Wed July 29** 03:30 PM - 04:15 PM CDT

**Location:** Lead theater large

**Speaker:** Ron Buist (Marketing Expert,, Inventor)

### **CS-112: Get serious about succession planning**

You've built your business from the ground up. You picked your company name, the office furniture, your team of trusted employees, and your technology investments. You've maintained a stable balance sheet and positive cash flow. You've seen your business to success, despite any hurdles or obstacles. But, now it's time to move on. Now what? In this session, panelists will share their experiences, tips, and advice for establishing a sound business succession plan.

**Wed** 04:30 PM - 05:15 PM CDT

**July 29 Location:** Customer theater

**Speakers:** Wai Au (Director, Voice of the Customer Programs, Sage North America), Alex Fein (General Manager, Court of Two Sisters), Robbye Rapp (Controller, Laborde Products, Inc.), Wayne Taylor (COO, Bassett Salon Solutions)

### **GN-30: Disrupting digital business: the postsales, on demand, attention economy is here**

We're standing at the dawn of a digital business revolution, but we barely realize it. As with the beginning of every revolution, those in the midst of it can feel it, sense it, and realize something big is happening. Yet it's hard to quantify the shift. The data isn't clear. From how we interact with one another to how we engage with organizations, the shift is right in front of us. However, organizations usually react to change by denying, delaying, and disparaging--a key reason why 52 percent of the Fortune 500 have been merged, acquired, gone bankrupt, or fallen off the list since 2000. Digital business disruption is no longer an option; it's a necessity. Social, organizational, and technology shifts require a new way of thinking about business, one that leverages a digital DNA to deliver experiences and outcomes and to transition from selling products to keeping brand promises. Learn how digital transformation allows you to use digital to disrupt instead of become one of the disrupted. Join R "Ray" Wang (@rwang0), head of Silicon Valley-based Constellation Research and best-selling author of "Disrupting Digital Business," as he shares practical guidance on how to disrupt and transform in any industry.

**Wed July** 04:30 PM - 05:15 PM CDT

**29 Location:** Profit theater small

**Speakers:** Douglas LaBahn (Product Marketing Sage Life, Sage), Ray Wang (CEO, Constellation Research)

### **HR-20: Using SAP Crystal Reports with Sage HRMS: Part 2 (hands-on)**

Build upon the foundations you learned in the Part I class to build more complex SAP Crystal Reports!

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Interactive learning 2



**Speaker:** Clay Stauffer (Trainer/Curriculum Designer, Sage)

### **MM-140: Getting your business on board with customer relationship management**

Feel like your company could do better with customers and winning new business but not sure how to convince other decision makers in your company? Join us as we discuss how to get your business thinking CRM. We will talk about how to make the case, articulate the challenges you could solve with CRM, understand measurable benefits of CRM, and deliver a highly successful business case to management.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Lead theater small

**Speakers:** David Beard (CRM Principal, Sage), Peter Wolf (President, Azamba)



### **MM-147: Get the most out of Sage 500 ERP**

This session will highlight the benefits of moving to Sage 500 ERP 2014 and provide an outlook on Sage 500 ERP 2015.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 4B

**Speaker:** Linda Cade (Sr. Product Manager, Sage)

### **MM-148: Understanding changes to Sage 300 ERP Payroll to support ACA and your efileing requirements**

This session will highlight the changes to support ACA for Sage 300 ERP Payroll as well as the requirements for efileing and reporting.

**Wed** 04:30 PM - 05:15 PM CDT

**July 29** **Location:** Learning commons 3C

**Speakers:** Andrea Ainslie (Senior Product Manager, Sage), Jessica Bohn (Forms Product Manager, Aatrix Software, Inc.), Bruce Senti (Director, Aatrix)

### **MM-150: Get the most out of Sage 300 Construction and Real Estate**

You've already made an investment in Sage 300 Construction. Are you getting everything you can out of your investment? Studies show that companies only use 20% of what they have in their software. Beat the statistics and learn how you can get more out of the software you have today.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 3A

**Speaker:** Jeff Adams (Product Mgr, Sr, Sage)

### **MM-151: Get the most out of Sage 100 Contractor**

You've already made an investment in Sage 100 Contractor. Are you getting everything you can out of your investment? Studies show that companies only use 20% of what they have in their software. Beat the statistics and learn how you can get more out of the software you have today.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 3B

**Speaker:** Angela Bloomer (Sr. Product Manager, Sage)

### **MM-168: Sage business partner: How Sage Inventory Advisor gives you a competitive edge in winning new business and increasing customer retention**

This session is for Sage partners that are interested in selling Sage Inventory Advisor. Sage Inventory Advisor is a product that can differentiate and deliver a strong ROI to win new business or offer new value to existing customers. Come hear how to uncover where this solution fits for which types of businesses and their challenges.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 1A

**Speaker:** Russell Graf (Vice-President - Sales, NETSTOCK)

### **MM-216: How wholesale and international trade companies optimize the supply chain and accelerate growth with Sage ERP X3**

This session will address best practices for managing complex aspects of your distribution business, and how using Sage ERP X3 can help you to operate at your most efficient and cost-effective. With the right tools, you can optimize your inventory investment, better control margins and reduce operating costs to improve your bottom line. Join us for this informative session to learn the hot business management and reporting topics facing distributors, and how Sage ERP X3 can give you the freedom to succeed.

**Wed July** 04:30 PM - 05:15 PM CDT

**29** **Location:** Grow theater small

**Speakers:** Aida Centelles (product marketing, Sage), Allan Fine (Field Sales Engineer, Sage)



Full

### **MM-397: Managing user security and setup in Sage ERP X3 (hands-on)**

With today's modern business management solutions, many companies are providing access to employees and partner companies. User security is an important consideration with deploying and managing your ERP

system for both internal access to sensitive data and for partner access to your system. Join us for this hands-on session to learn how to set up users and manage user security in Sage ERP X3.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Interactive learning 1

**Speakers:** Danielle Holt (Director, Product Management, Sage), Scott Shifko (Professional Services Consultant II, Sage)



### **MM-405: Collaboration in the field and for ops: what it brings to your teams**

Collaboration is often overused and can be an all-encompassing term. To be successful in the construction industry, a contractor has to collaborate with many people from the owner and architect to the field personnel onsite. The contractor who can learn how to join these forces will be the contractor who comes out on top. This session will enable you to learn from both successes and failures that have happened within this dynamic roundtable. Learn how you can better partner with stakeholders, reap the rewards, and be ready for the future of collaboration in the construction industry.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 5B

**Speaker:** John Goecke (Chief Operating Officer, StratusVue)

### **PR-170: Product showcase: ACA comply**

Come and see this web-based solution consisting of newly developed dashboards and reporting capabilities all designed to help the employer with the complexities of the Affordable Care Act (ACA).

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 2A

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 2B

### **SA-59: Building a vision for your firm**

Professionals who succeed today provide the tools, information, and technology their clients need. Whether you are a CPA firm, tax preparer or bookkeeper, today's firms have changed; it's not just about the bookkeeping and taxes. Now is the time to look at the different accounting service provider opportunities. Topics include creating dynamite customer service, designing outsourced CFO programs, building customized and integrated systems, and industry specialization. Creating a vision for your firm will help you explore on the opportunities to pursue and focus on building your own business.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 4A

**Speaker:** Leslie Shiner (Owner, The ShinerGroup)

### **SB-183: Tips and tricks for getting more out of Sage 50--U.S. Edition**

Discover time-saving techniques that will help you use Sage 50 more efficiently. Your time is important, so let us help you spend it wisely.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Interactive learning 5

**Speaker:** Jamie Smith (Sr. Customer Support Analyst, Sage)



### **SB-237: LEGO serious play session for accountants**

In this session, LEGO bricks and elements are used in a way where people are empowered to 'think through their fingers', unleashing insight, inspiration, and imagination. In a very direct way, you'll be able to see what everyone knows inside the company—and what they don't know they know!

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Learning commons 4C

**Speaker:** Nadia La Russa (President, Signature Financial Services)

### **SP-119: Vertex SMB--a better alternative for sales and use tax automation**

In this session you will see how the Vertex SMB sales and use tax automation solution directly integrates with Sage 100 and 300 ERP. Our partners Net@Work, Socius, and Blytheco will discuss why they partner with Vertex SMB and talk about their client successes. The Vertex SMB solution is cloud-based and seamlessly integrates with Sage products, uniquely offering pay-as-you-go pricing with no up-front fees and

no long-term contracts. Vertex SMB features tax calculations and returns in one solution with signature-ready PDF returns included for no additional cost. If you are currently using a sales tax solution or are interested in automating your process, you don't want to miss this!

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Sponsor theater B

**Speakers:** Cathy Harris (ERP Support Specialist, Vertex SMB), Bradd Wildstein (Director of Channel Sales, Vertex SMB)

### **SP-130: Join the DocuSign digital transformation**

DocuSign is on a mission to replace paper and digitize all your business processes. Come see and hear how we are helping our customers manage their transactions in new ways in their business both at the office and while mobile

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Sponsor theater A

### **TL-109: Building a business 100% in the cloud**

Today, you don't need a single server to launch an amazing company. Learn how schoolofbookkeeping.com built its business leveraging 100% cloud resources and tools and integrated a team from all over the country. We'll discuss cloud storage and collaboration with Google Drive, Dropbox, Box; cloud-based phone systems; cloud-based email campaign management such as MailChimp; cloud-based website building tools including Wordpress; cloud-based scheduling/calendaring; cloud-based invoicing and integration; cloud-based project management; cloud-based analytics, marketing, and more. We might even talk about cloud accounting!

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Differentiate theater small

**Speaker:** Eric Greenspan (Co-Founder/CEO/Chief Clever Officer/Dean of Delight, schoolofbookkeeping.com)



### **TL-138: The nine biggest money wasters in your business**

Your business is losing money right now at an alarming rate. Every dollar spent that does not earn long-term profit for the company hurts its profitability. You'll be surprised at what some of those big money wasters are.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Profit theater large

**Speaker:** Barry Moltz (Speaker, Entrepreneur,, Consultant & Author)



### **TL-139: Disrupt your industry: making your mobile dream a reality**

Have you dreamt of disrupting your industry with smartphone and tablet apps for your B2B business? You have a lot of company, but the good news is, in the B2B world most haven't figured out where to start. In this session, we will describe how companies in B2B industries went from zero to mobile virtually overnight by creating a vision, strategy, and action plan to harness new opportunities for sales, operational efficiency, and profits. Hear how companies that sell beverages, restaurant supplies, grocery products, dirt, landscaping material and services, computer peripherals, medical instruments, industrial equipment, and more are rising above the competition and creating real value through mobile technologies for their ERP systems.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Differentiate theater large

**Speaker:** Paul Ziliak (Co-founder, xkzero)

### **TL-154: How to leverage innovation and technology for global growth**

Generally speaking, many businesses underuse whatever technologies they already have. Are you one of them? The objective of this session is to uncover how to leverage technology such as social networks, mobile computing, analytics, and cloud computing to support your international growth. This session examines how you can find out your "as is position" by doing a technology audit. This will allow you to develop a robust technology plan to leverage technology that is readily available that neatly fits with your business strategy and ambitions for global growth.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Grow theater large

**Speaker:** Desmond Ryan (International Trainer,, Educator, and Mentor)

### **TL-156: Practical tips: international negotiation techniques that work!**

In this session we will look at how cultural differences impact the way that negotiations are conducted. We will explore each phase of the negotiation process and identify how people from different cultures would interpret and enact that phase. At the end of the session, the participants will have a list of "best practices" to take into consideration when planning negotiations with people from other cultures.

**Wed July 29** 04:30 PM - 05:15 PM CDT

**Location:** Lead theater large


**Speaker:** Barbara Boldt (Dynamic International Consultant, and Trainer)

### **CS-110: Get social: spread the word and grow your business**

This lively session on maximizing the power of social media to grow your business will feature social media experts and gurus from several small businesses. The panel will discuss how to implement strategies to engage with and drive word of mouth among your customers and find influencers that matter.

**Thu** 11:45 AM - 12:30 PM CDT

**July** **Location:** Customer theater

**30** **Speakers:** Dru Chai (Social Media Manager, Sage), Tereson Dupuy (Founder,  Full  
FuzziBunz Diapers), John Fronius (VP, Knowledge Management, Sage North America),  
Shameka Reed (CEO, Savvy Inc. PR, Marketing Media Group)

### **GN-24: Increasing user adoption--dealing with resistance**

Has your organization's productivity or effectiveness been challenged by employees who are resistant to change? Perhaps you have new processes or tools you need them to adopt? This session is dedicated to the possibility that we can increase the level of adoption of new systems, processes, and tools in our businesses by changing the way we interact with our teams. If you are interesting in joining this conversation about dealing with resistance, you are invited to attend this session facilitated by Ed Kless.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 4B


**Speaker:** Edward Kless (Consultant, Sage)

### **HR-21: ACA and My Workforce Analyzer: Or how I learned to stop worrying and love ACA**

Learn how My Workforce Analyzer can ease your ACA concerns by providing you detailed analytics on your employees and the 1095-C and 1094-C reports required in 2015.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Interactive learning 5


**Speaker:** Clay Stauffer (Trainer/Curriculum Designer, Sage)  Full

### **MM-100: Sage 100 ERP: paperless office**

Save time, money, and the environment by using the paperless office capabilities provided in Sage 100 ERP. Learn how to quickly and easily find files, view reports and forms, and print only the pages you want. And, when you need them again, retrieve them from the archives using intuitive search and sort tools, reducing the time you and your employees spend searching through old files and reports.

**Thu** 11:45 AM - 12:30 PM CDT

**July** **Location:** Learning commons 3B

**30** **Speakers:** Deneice Chavez (PM, Sound Productions), Carmen Cruz (Customer Support Analyst, Prin, Sage), Joshua Curlett (Chief Operating Officer, Sound Productions, Inc.),  Full  
Deborah Nelson (Product Manager, Sage), Steve Passmore (Software Engineer,  
Principal, Sage)

### **MM-108: Become a power user of your Sage Intelligence solution and produce more meaningful information**

Take your knowledge of the Sage Intelligence module to the next level. Join us as we unleash the power of Sage Intelligence in this session full of useful tips for business reporting and report customization. See close-up demonstrations of best practices and tips for using Sage Intelligence. Learn more about the power of Sage Intelligence and how it leverages Excel, a tool you probably already know, to give you the freedom to

customize and analyze reports according to your business' unique requirements. See how it can help you consolidate information, track progress, and encourage collaboration among teams.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 2C

**Speaker:** Sandra Smith (Product specialist, Sage)

### **MM-127: Streamline your service operations, bolster your bottom line, and wow your customers**

Would you like to give your field technicians access to vital information so they can get the job done right the first time? What if you could reduce unnecessary administrative overhead and improve customer service? Find out how Sage Service Operations can help streamline your service operation and help you get paid faster.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 5D

**Speaker:** Angela Bloomer (Sr. Product Manager, Sage)

### **MM-149: Get the most out of Sage 300 ERP**

Come experience the new features available in Sage 300 ERP. More than just a road ahead session, you'll see a hands-on demo of the numerous new features that will help your company grow.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 3C

**Speakers:** Debbie Hill (Pre-sales engineer, Sage), Richard Jang (Product Business Analyst - Advisory, Sage)



### **MM-157: Best practices in fixed asset management**

Keeping up with your fixed assets can feel like a full-time job. Join us for an overview of best practices in fixed asset management.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 4C

**Speakers:** Grant Griebel (Inside Sales Engineer, Sr, Sage), Tammo Stubbe (Product Marketing Mgr, Sr, Sage)

### **MM-199: IT manager view: Sage ERP migration to Sage ERP X3 plan**

When you're ready for a more comprehensive ERP, Sage ERP X3 is something you should consider. Participate in this session to identify project plan considerations--from an IT perspective--for migrating your Sage ERP to Sage ERP X3.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 4D

**Speakers:** Mark Battaglia (Mgr, PSG, Sage), Zach Bellhy (Sales Engineer, Sage)

### **MM-212: Best practices for successful chemical companies**

Managing the competitive landscape is enough of a challenge for any business. For chemical companies, the ever-changing regulations and laws locally and globally adds to the complexity. Learn how companies are solving for compliance and global harmonization from Sage and a featured Sage customer.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 5C

**Speakers:** Myra Hager (Vice President, ABC Compounding), Jeffrey Mills (Dir, Product Marketing, Sage), David Padgett, CEO (President, Provenio Technology)

### **MM-382: Getting more out of Sage ERP X3 (hands-on)**

You've already made an investment in Sage ERP X3. Are you getting everything you can out of your investment? Studies show that companies only use 20% of what they have in their software. Beat the statistics and learn how you can get more out of the software you have today.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Interactive learning 1

**Speaker:** Karen Hayward (Trainer, Sage)



**PY-173: How to manage internal spend within your business**

There are many benefits to using prepaid cards including improving efficiency and financial control. During this session, we will discuss how to control employee spending (unapproved purchases, overspending) and provide visibility to expenditures in real time (account balances, daily spending) for your business customers.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 5A

**Speakers:** Toffer Grant (CEO/Founder, PexCard), Jon Zimmermann (Product Mgr, Sr, Sage)

**SA-53: Pricing in practice: a new business model explored**

This is an overview of how to scope, demonstrate value, and effectively price a client using the value pricing approach. This session explores an alternative business model to the time-based practice. The session will cover how to define a lead call structure and identify client pain points, techniques for demonstrating value beyond compliance, and how to translate scope into a price and present pricing options.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 4A

**Speaker:** Josh Zweig (Co-Founder, LiveCA, LLP)

**SB-180: Designing custom financial statements for your business**

Put your best foot forward. Learn how to create customized, professional financial statements for your business.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Interactive learning 4

**Speaker:** Antonio Soeiro (Account Manager, Sage)



Full

**SB-238: Getting paid just got easier**

It's pretty hard to embrace the cloud while accepting only cash and cheque payment methods. The expectations of the market have changed, and convenience is the de facto standard of customer service. Learn how integrated payments by Moneris Solutions will do away with manual data entry and minimize errors.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 5B

**Speaker:** Paul Ellis (Dir, Product Management, Sage)

**SB-246: Measuring project profitability in Sage 50**

Learn from an expert the options within Sage 50 for budgeting and measuring revenue and expenses against a defined project. In this session both departmental accounting and the Sage 50 Project/Job module will be explored.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Learning commons 3A

**Speaker:** Alistair Ellis (Product Mgr, Sr, Sage)

**SP-120: Affordable Care Act (ACA) reporting starts now**

Get complete ACA reporting compliance using the integrated solution within your Sage payroll. Cut your reporting costs in half.

**Thu July 30** 11:45 AM - 12:30 PM CDT

**Location:** Sponsor theater A

**Speaker:** Bruce Senti (Marketing Manager, Aatrix)

**SP-123: Salesforce.com and Magento eCommerce with Sage ERP: a "best of breed" approach to 360-degree customer Interaction interfaces**

Salesforce.com, Magento, and Sage are most trusted and best of breed brands having thousands of installations for CRM, e-commerce, and ERP worldwide. Greytrix session will help you to understand how these best-of-breed systems work together to give a 360-degree customer interaction and interfaces for

seamless operations of front-office, back-office, and portal activities, reducing time, saving costs, and increasing accuracy of data exchange. See how world-class organizations are using these world-class enterprise systems together to drive maximum connection between their finance and sales team with their customers in this seamless interconnected world.

**Thu July 30** 11:45 AM - 12:30 PM CDT  
**Location:** Sponsor theater B  
**Speaker:** Kumar Siddhartha (CEO, Greytrix)


### **SP-127: Experience and learn about the new Windows 10 modern user interface**

This presentation discusses mobility of user experience and how Windows 10 will drive productivity.

**Thu July 30** 11:45 AM - 12:30 PM CDT  
**Location:** Differentiate theater large  
**Speaker:** Juha Harkonen (Business Evangelist, Microsoft)

### **TL-122: Using psychology 101 to build your business**

You are not crazy and neither are your customers – or at least most of them aren't. But you can use psychological principles to better understand the needs of your customers and help them understand their need for your services. Exploring concepts such as perception, cognition, attention and motivation can help you build your business. Find ways to improve interpersonal relationships to improve your own profits.

**Thu July 30** 11:45 AM - 12:30 PM CDT  
**Location:** Grow theater small  
**Speaker:** Leslie Shiner (Author, Trainer, Speaker, The Shiner Group)  Full

### **TL-140: Take the test: determine your small business health score**

How healthy is your company for 2015? Review these ten elements and determine your small business health score to find out where you stand to grow and make more money this year.

**Thu July 30** 11:45 AM - 12:30 PM CDT  
**Location:** Lead theater large  
**Speaker:** Barry Moltz (Speaker, Entrepreneur,, Consultant & Author)


### **TL-142: Profit impact of business intelligence**

In this session, participants will learn the importance of identifying the key metrics that drive company profitability and how to develop business strategies that support these metrics. Examples include analyzing your customer data on a deeper level, vendor data, and business costs.

**Thu** 11:45 AM - 12:30 PM CDT  
**July 30** **Location:** Profit theater large  
**Speakers:** Jerry Henderson (National Industry Partner, BKD National Manufacturing & Distribution Group), Tim Wilson (National Industry Partner, BKD National Construction & Real Estate Group)

### **TL-159: Replacing the annual performance appraisal ritual**

Most organizations and employees are dissatisfied with the performance appraisal process, so it remains a curiosity why this methodology continues to exist. Performance appraisals don't drive careers; they are an incidental effect of other dynamic systems. In essence, appraisals are the paper-shuffling ritual that sanctifies decisions already made. Major topics: why it's a legal myth that performance appraisals protect you from litigation or in court; why appraisals instinctively focuses on weaknesses, not strengths; why "annual" is far too long to evaluate and provide feedback to knowledge workers. Examples of effective replacements to the annual performance appraisal: Peter Drucker's Manager's Letter; after action reviews; key predictive indicators; an innovative compensation plan that rewards knowledge workers for the value they create, not the time they spend; implementing Peter Drucker's orchestra; secrets of the "gifted boss"; a better idea than classifying people as Gen "X," "Y," and "Z."

**Thu July 30** 11:45 AM - 12:30 PM CDT  
**Location:** Lead theater small  
**Speaker:** Ron Baker (Founder, VeraSage Institute)  Full

### **CS-105: Master the art of innovation**

How can a small or midsized business make innovation part of its everyday business? This session will feature a panel of leaders from various businesses and industries sharing their best practices and methods. You'll take home executable ideas, tools, and techniques for innovating within your business to achieve more growth and success.

**Thu** 01:30 PM - 02:15 PM CDT

**July 30 Location:** Customer theater

**Speakers:** Nicolette Kavanagh (VP of Operations, Starborn Industries), Carlos Matos (President, Pronto Products), Gemma Price (Founder, Superfood Markets)



### **GN-23: Changing conversations by asking better questions**

This session is dedicated to the possibility that professionals can greatly increase the value they provide to their customers if they hone their skills at asking better, more effective questions. Developing and enhancing this skill is not easy because it requires us to rethink and relearn conversation habits. If you would like to learn how this questioning approach can strengthen your customer conversations, join Ed Kless for this discussion-based session.

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 4B

**Speaker:** Edward Kless (Consultant, Sage)



### **HR-15: Punching in for improved workforce management**

Learn how a time and attendance system can vastly improve your ROI and help eliminate inaccurate timekeeping. An appropriate time and attendance system that meets your organizations needs can help to eliminate and even prevent many, if not most, of the negative aspects of inaccurate and unreliable timekeeping. Maintaining accurate and reliable time and attendance information allows you to keep a handle on labor costs, increases the accuracy of payroll, and reduces administration in the human resources (HR) department, thus saving time.

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Lead theater small

**Speaker:** Greg Javins (Vice President, Sage)

### **MM-101: Sage 100 ERP: Visual Integrator**

Open architecture is the catch phrase for business application software and databases these days. Companies that in the past may have put up with discrete applications running separately and may have had to perform software gymnastics to obtain integrated reporting are now demanding that these products work together. Learn how to use Visual Integrator to seamlessly integrate Sage 100 ERP data and other business applications.

**Thu July** 01:30 PM - 02:15 PM CDT

**30 Location:** Learning commons 2C

**Speakers:** Scott Brady (Customer Support Analyst, Advisory, Sage), Steve Passmore (Software Engineer, Principal, Sage)

### **MM-146: Staying connected to your business while you are on the move**

In a 24/7 world, you need to keep your business moving no matter where you are. Join this session to learn how you can keep your business moving through access to critical, up-to-date customer information as well as make informed decisions and give approvals while you are on the move.

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Differentiate theater small

**Speaker:** Karen Foreman (Strategic Account Manager, Sage)

### **MM-173: Migrating to Sage 300 ERP**

Hear firsthand from a Sage BusinessVision customer why migrating to Sage 300 ERP to support their growing needs was the perfect solution

**Thu** 01:30 PM - 02:15 PM CDT

**July 30 Location:** Grow theater small

**Speakers:** Andrea Ainslie (Senior Product Manager, Sage), Donald McDougall (VP Finance Operations, Throat Threads Apparel Inc.), Chris Morrison (Director, Throat Threads)



### **MM-195: Get a competitive advantage for your products and solutions with the Sage Certified Solution program for Sage ERP X3**

With the help of our growing developer community, Sage ERP X3 offers a rich ecosystem of quality, integrated solutions that meet unique business needs for customers globally. Join this session to learn how you can be part of the Certified Solution program and tap into our ever-growing base of 6 million Sage customers worldwide.

**Thu** 01:30 PM - 02:15 PM CDT

**July 30 Location:** Learning commons 4C

**Speakers:** Chris Corder (Sr. Product Manager, ISV Mid-Market Ecosystem, Sage), Bill Rietz (VP, Product Management, Sage), Locke Truong (Dir, Product Marketing, Sage)

### **MM-232: Sage 500 ERP: Do you know what you don't know--manufacturing features?**

This tips and tricks session lets you explore new features added since the release you are currently using in manufacturing in a hands-on lab with a Sage expert proctor on hand, plus the experiences of your peers to draw from.

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 5B

**Speaker:** Linda Cade (Sr. Product Manager, Sage)



Full

### **MM-236: Enable your mobile salesforce with Sage Mobile Sales (bring-your-own-device)**

Connect your salesforce to the information they need back at the office anytime and anywhere. Learn how the Sage Mobile Sales mobile app puts your entire product line at your salesforce's fingertips, allows them to generate quotes and create orders that show up back at the office immediately, and take credit card payment on site.

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Interactive learning 3

**Speaker:** Sean Taylor (Strategic Account Manager, Assoc, Sage)



Full

### **MM-251: Sage Fixed Assets: best practices in conducting a physical inventory**

Conducting a physical inventory of your fixed assets is a critical step to lowering your tax and insurance burden and freeing up dollars for the bottom line. And if you have never done a physical inventory of your fixed assets and don't know where to start, this session is for you. Join us in this session, learn about best practices in conducting a physical inventory, and see just how easy it can be to conduct a fixed asset inventory with Sage Fixed Assets--Tracking.

**Thu July** 01:30 PM - 02:15 PM CDT

**30 Location:** Learning commons 4A

**Speakers:** Robert Bassett (Dir, Inside Sales, Sage), Suzanne Pedone (CEO and Founder, Inventory Management Solutions Inc.)



Full

### **MM-388: Introduction to Sage Enterprise Intelligence with Sage ERP X3 (hands-on)**

Explore Sage Enterprise Intelligence and learn how it provides data at a glance and highlights business data with charts and graphs and learn how you can use it to increase productivity and efficiency at all levels of an enterprise. Get your hands on this powerful intelligence tool at this session.

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Interactive learning 1

**Speaker:** Karen Hayward (Trainer, Sage)



Full

### **MM-406: Less paper AND improved productivity? Find out how with Sage Paperless Construction**

Join us for this product "deep dive" and see firsthand how Sage Paperless Construction can streamline your document management workflows. A true invoice routing and approval process minimizes costly oversights, and your team never has to dig through stacks of papers to locate important documents. You'll see how an electronic-based document management system gives you easy access to all company- and project-related documents and improves productivity throughout your entire organization.

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 3B

**Speaker:** Vincent Pate (Inside Sales Engineer I, Sage)

**PY-174: Apple Pay? EMV? Android Pay? What's happening to how I get paid?**

The payment industry in North America is currently undergoing an exciting shift from the perspective of both consumers and businesses. Consumers are experiencing new payment capabilities like Apple Pay (with Android Pay and Samsung Pay coming), Visa Checkout and MasterCard MasterPass. Most of the new capability is being unlocked by EMV and the resulting changes to traditional POS terminals – EMV is coming in the United States and has been a standard in Canada for several years. Businesses of all sizes are making decisions to replace their aged POS terminals with mobile and tablet based solutions (and business solutions like Sage) experiencing rapid growth. Hear from Moneris, one of North America's largest credit card processor, on these game-changing payment trends and the partnership that Moneris has forged with Sage in the US and in Canada This session will discuss the evolution of payments and the need to efficiently manage your business – key components of the Sage/Moneris partnership. A partnership that continues to grow in Canada as new functionality like data-rich reporting is brought to market and a continued commitment to be industry leaders in delivering innovative business solutions.

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Profit theater small

**SA-43: For accountants-bookkeepers in public practice and Sage business partners: How providing strategic advisory services through Sage View can benefit accounting professionals**

Making your daily tasks less time-consuming as an accounting professional is something you are always striving for. With Sage View, you can compile client data more efficiently and, in turn, provide the valuable strategic advice your clients deserve. This course will go over the benefits you will get by providing strategic advisory services through Sage View.

**Thu** 01:30 PM - 02:15 PM CDT

**July 30** **Location:** Learning commons 1B

**Speakers:** Gary Olynik, CPA, CMA (Accountant Advocate, Sage Accountant Solutions, Sage), Laurie Rodriguez, CSPO (Sr. Product Manager, Sage Accountant Solutions, Sage)

**SA-48: The radical accountant: new rules for the future-ready firm**

Learn the fundamental tenets of a future-ready, customercentric firm built for today's rapidly changing business environment. Learn how working in the cloud streamlines workflows and delivers enhanced client services. Learn how the shift to social media channels can attract and serve profitable clients. Learn the basics of a new vision of customer-driven innovation in developing and marketing new products and services and in reinventing internal firm processes and procedures; create a new accounting firm business model of flexible, results-driven workplaces, client focus, and value pricing. This session is for those firm leaders looking for support and direction on how to change and take those crucial first steps.

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Learning commons 5D

**Speaker:** Jody Padar (CEO and Principal, New Vision CPA Group)

**SA-51: Think big and ignite your practice**

Based on the ten commandments for entrepreneurs, this talk is designed to inform and inspire new business owners to achieve greatness. From the first day to business formation to raising capital, landing huge strategic partnerships to selling your firm, this talk will leave you wanting to get started IMMEDIATELY or to take your existing firm to a whole new level.

**Thu July** 01:30 PM - 02:15 PM CDT

**30** **Location:** Learning commons 5C

**Speaker:** Eric Greenspan (Co-Founder/CEO/Chief Clever Officer/Dean of Delight, schoolofbookkeeping.com)

**SB-185: New features in Sage 50--U.S. Edition to help you work faster and smarter**

We'll bring you up to speed on all the latest features and enhancements from the last four years. You'll be amazed at what you've been missing and how much time it will save you every day.

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Interactive learning 5

**Speaker:** Jamie Smith (Sr. Customer Support Analyst, Sage)



Full

**TL-143: The next two years: your growth and opportunities and the latest political, economic, and technological trends that will dominate your business**

The recession is over. Unemployment is down. You know this. Your employees know this. And over the next two years, as your company grows, the issue won't be about just keeping your costs under control. It will be about watching what's going on in Washington, taking advantage of new opportunities, and being smart about your investments. It will be about capitalizing on the latest trends in technology, cash flow, and finding and motivating the very best people. So what do you know to navigate your company through the next two years? During this presentation, Gene will cover some of these topics: a look at how the outcome of the midterm elections will affect your business for the next two years; a current look at the Affordable Care Act--where we are at and how it will affect your business; a review of current tax issues every business owner needs to know and what tax moves you should be making now to profit in the next two years; a look at a few financial metrics and economic metrics that smart business owners are using today to grow their companies; ways you can profit from the coming rise in inflation and interest; new technologies that will impact your business over the next two years; the exploding trend of business owners selling their companies and what you can do to increase the value of your company; the latest best practices, tools, and technologies for finding and managing outsourced people and services . . . and much more!

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Grow theater large

**Speaker:** Gene Marks (Columnist, Author & Small Business Owner, The Marks Group)

**TL-144: How to appeal to the Millennial consumer: Millennials will have the largest combined spending power of any generation by year 2017**

Millennials will have the largest combined spending power of any generation by the year 2017, and the time is now to better understand the mindset of this generation. Millennials are a population unlike any before, and figuring out what makes them tick will strengthen your marketing tactics to appeal to this coveted group of 80 million people. You will leave this 45-minute presentation with a clear understanding of who this generation is, what makes a Millennial buy a certain product, and how to grow a community through social media to amplify brand awareness, which will help generate more sales.

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Differentiate theater large

**Speaker:** Chelsea Krost (Millennial Generation Characteristics Expert, Author & Speaker)

**TL-145: If I made a profit, where's my cash?**

Cash is the lifeblood of every business. Why then is it so hard to track? For many business owners, it's an annual struggle to understand the difference between profit and their bank balance. In this session, you'll learn where to find the missing cash, how to educate your team about the relationships among the three main financial statements, and how to improve your overall business results. Leave the session with tools and insights that will help you get your cash flowing in the right direction.

**Thu July 30** 01:30 PM - 02:15 PM CDT

**Location:** Profit theater large

**Speaker:** Geni Whitehouse (Author, Speaker & Blogger, Even a Nerd Can Be Heard)

**TL-146: Succession planning: developing tomorrow's leaders today**

Simply extrapolating the past is no longer adequate for firms when trying to anticipate the future. Strategic foresight does not attempt to forecast the future, but simply allows firms to understand key drivers that may result in plausible future scenarios and provides the tools to position them favorably regardless of which future(s) actually unfold. Participants will gain understanding on how their firm competes, be able to determine primary drivers on these competitive aspects and anticipate how these drivers will change during specific time frames, and will review the best- and worst-case scenarios for their company. The primary objective is for participants to leave as champions in their organizations for embracing the future. Objectives: examine competency-based leadership development strategy; gain an understanding of the structures and tools needed for ongoing organizational leadership development.

**Thu July** 01:30 PM - 02:15 PM CDT

**30** **Location:** Lead theater large

**Speaker:** Alan Patterson (International Consultant, Author, Speaker, Business Learning Institute)

**CS-111: Investing in your most valuable asset: your people**

This enlightening session will discuss ways to invest in your employees to help your business grow and thrive. HR professionals from three small businesses will discuss how they hire and retain the best talent and create a customercentric culture, all while staying compliant with the latest employee-related legislation, such as the ACA.

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Customer theater  
**Speakers:** Joshua Curlett (COO, Sound Productions), John Fronius (VP, Knowledge Management, Sage North America), Christopher Lee (Chief Executive Officer, R. E. Lee Companies), Brenda Pinto (CFO, Quality Material Handling, Inc.)  Full

#### **HR-16: Sage business partner: how to make \$250,000 selling Sage HRMS**

This closed-door business partner session covers the benefits of incorporating Sage HRMS into your Sage sales portfolio.

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 1A  
**Speakers:** Olivier Cuvillon (Sr Dir, Field Sales, Sage), Cristine Hamilton (Business Development Mgr, Sage)

#### **HR-17: Sage HRMS 2016 and beyond**

Join this campfire session to learn about the exciting things in store for Sage HRMS customers now and in the future. Prepare to be blown away. Marshmallows not included.

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 4C  
**Speakers:** Damian Blurton-Jones (Product Mgr, Sr, Sage), Jennifer Dungan (Dir, Product Management, Sage)  Full


#### **MM-114: You're still mailing your invoices?**

Many businesses are making the transition from paper-based invoices to electronic delivery in order to speed the time from billing to receipt of payment. Attend this session to hear how different industries and business of all sizes get started with e-invoicing, their tips, success stories, and more.

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 4D  
**Speaker:** Karen Foreman (Strategic Account Manager, Sage)


#### **MM-141: How to evaluate and build a business case for technology purchases**

Are you evaluating a new software solution for your business? Do you need to build a business case to show how your company will benefit from a technology purchase? Attend this session to see how you can set up an evaluation process designed to make sure you make the right decision and build a business case that shows how your business will benefit and what the real total cost of ownership is.

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Lead theater small  
**Speakers:** Thomas Nolan (Head of Sage CRM On-Premise, Sage), Peter Wolf (President, Azamba)  Full

#### **MM-167: What you can get out of Sage Inventory Advisor--for both customers and noncustomers (hands-on)**

Come to this session to learn about tips in best inventory practices using Sage Inventory Advisor. First half will lay the groundwork for the whole audience. Second part we'll focus on our existing customers. If you don't use Sage Inventory Advisor, watch over the shoulder of a customer as he deepens his skills sets and gets to know the power of this tool. Finally, hear what to expect in future releases.

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Interactive learning 2  Full  
**Speaker:** Craig de Kock (VP - Group Operations, NETSTOCK)

#### **MM-175: Get paid faster with Sage Payment Solutions**

Whether you accept checks, credit cards, or electronic payments, you can streamline your payment process and consolidate all your payment types in one place while saving time and money! Come and learn more about Sage Payment Solutions and how integration with your Sage ERP helps you get paid faster.

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 4A  
**Speaker:** Geoff Cox (Dir, business development - SPS, Sage)

**MM-196: Learn how to improve usability with Sage ERP X3**

Join us to learn how the improved usability of Sage ERP X3 has helped our customers succeed. Customers will tell their story in this session and answer questions you have.

**Thu July 30** 02:30 PM - 03:15 PM CDT

**Location:** Differentiate theater small

**Speakers:** Wendy Murray (Field Sales Engineer, Sage), Michael Petzing (IT MANAGER, VACUUM ENGINEERING MATERIALS CO.)

**MM-217: How to increase operational efficiency and accelerate growth for your manufacturing business with Sage ERP X3**

This session will address best practices for managing complex aspects of your manufacturing business, and how using Sage ERP X3 can help you to operate at your most efficient and cost-effective. With the right tools, you can understand the true cost of your inventory, and better control margins and operating costs to improve your bottom line. Join us for an informative session to hear the hot business management and reporting topics facing discrete manufacturers, and how Sage ERP X3 can help ease burdens and improve efficiencies.

**Thu July 30** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 3B

**Speakers:** Chet Childers (Sales, Sage), Benoit Le Tohic (Sr. Product Marketing Manager, Sage)

**MM-233: Sage 500 ERP: customer service features--a how-to workshop**

From the time the quote is issued, through the production, fulfillment, shipping, delivery, and follow-up, see how the features in Sage 500 ERP make it easier for your customer service people to manage and track every aspect of a customer's experience with you. This session looks at the tools and methods available and provides tips and tricks from Sage and your peers.

**Thu July 30** 02:30 PM - 03:15 PM CDT

**Location:** Learning commons 5B

**Speaker:** Linda Cade (Sr. Product Manager, Sage)

**MM-390: Out-of-the-box personalization capabilities with Sage ERP X3 (hands-on)**

Sage ERP X3 offers amazing functionality out of the box to build custom screens, forms, and inquiries--all without a computer science degree! Join us in this hands-on session, where you can practice your design skills and learn how you can personalize your Sage ERP X3.

**Thu July 30** 02:30 PM - 03:15 PM CDT

**Location:** Interactive learning 1

**Speaker:** Gerald Brown (Trainer, Sage)

**MM-411: Sage business partner: Sage Live product demonstration**

You have heard about Sage Live, so now come see the product! (For Sage partners only) Sage Live connects your people to your business, giving constant access to a complete picture so you can make immediate, proactive decisions. Sage Live is a social, mobile, and global business solution with a powerful accounting engine built on the Salesforce platform. Sage and Salesforce.com have joined to deliver the real-time financial and operational data businesspeople need in the crucial moments that matter. Come learn about the product and how to get involved with Sage Live!

**Thu July 30** 02:30 PM - 03:15 PM CDT

**Location:** Interactive learning 5

**Speakers:** Karen Ainley (Head of commercial, Sage), Mary Balmer (Dir, RD, Sage)

**SA-60: State of accounting: a clarion call for CPAs and accountants to get out of the box**

A recent study by Oxford put the accounting and auditing profession at a 94% disruption by technology. In addition the profession is facing the massive "shift change" as a new generation begins to take the reins from the retiring Baby Boomers. Major shifts in leadership, learning, technology, generations, and the workplace are under way. Except this time it is different. This time the incoming shift will require a new set of skills and tools to continue the work of the prior shift. The cause of the shift change is the rapidly changing and complex hypercompetitive environment that has become the new normal.

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 5C  
**Speaker:** Tom Hood, CPA, CITP, CGMA (Chief Executive Officer, Maryland Association of CPAs, Inc. BLI)



### **SA-63: Making bookkeepers count**

"The bookkeeper's time is now," according to Garry Carter, global president and CEO of The Institute of Certified Bookkeepers (ICB). "The bookkeeping profession is changing faster than ever before. Bookkeepers need to realize this, prepare for it, and embrace the emerging technology that can make them even better bookkeepers". Carter believes that bookkeepers need to come out from under the shadow of CPAs. They are different people, and they offer different services to small businesses. The question is, why have they allowed themselves to fall out of the limelight for so long? Carter thinks it is because up until now bookkeepers haven't had a common standard to work to, so small businesses haven't known what to expect from a bookkeeper or how to use a bookkeeper to improve their business. "Businesses need confidence that their bookkeeper can deliver," says Carter. "And if bookkeepers don't believe in themselves, why should businesses?" All this is about to change with the launch in the USA of The Institute of Certified Bookkeepers Inc., (ICBUSA) and the introduction of its independent ICB Certified Bookkeeper program. In this thought-provoking session, Carter will share his passion for bookkeeping and show how bookkeepers can major in on their strengths. He will talk about what they have to prove and show ways that they can prove it. He will show what makes a bookkeeper unique, expected growth of the profession over the next few years and how to take advantage, how to add value to the bookkeeper proposition, how not to waste time on bad clients, how to embrace emerging technology, how independent certification will improve the profession, how bookkeepers can grow their self-esteem, how they can be acknowledged as professionals, and how to prove they are the best at what they do.

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Learning commons 5A  
**Speaker:** Garry Carter (CEO, Institute of Certified Bookkeepers)

### **SP-112: What is a bar code and how do I use it?**

Bar codes are everywhere. Learn what they are and how you can use them. ScanForce will cover the basics of bar coding and how using an integrated solution can improve and streamline processes.

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Sponsor theater A  
**Speaker:** Steve Showalter (Sales Manager, Scanforce)

### **SP-124: A comprehensive look at all Aatrix services**

Aatrix delivers a comprehensive set of automated reports including unemployment, wage withholding, new hire, HR, payments, W-2s, 1099s, certified payroll reports, and now ACA reporting.

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Sponsor theater B  
**Speaker:** Bruce Senti (Marketing Manager, Aatrix)

### **TL-118: Take your pitch from sucky to successful: the top six pitch mistakes and how to fix them**

Regardless of whom you're looking to attract, a powerful pitch can make the difference between a closed deal and a closed door. Most people think that a good pitch is all about passion and personality. While these traits may get you noticed, they won't get you funded. In this presentation, Desiree Young of VentureWalk covers the top six mistakes business owners and professionals make in pitching their concepts and businesses and how to fix them. This seminar will help listeners understand the difference between a concise, clear, and compelling pitch that gets people to buy-in, sign on the dotted line, and even fund their ideas and a pitch that ultimately falls flat (or is sucky). She'll draw from her ten-year career as a presentation and pitch coach and her experience in consulting dozens of entrepreneurs in getting funded, increasing sales, and winning pitch contests.

**Thu July 30** 02:30 PM - 03:15 PM CDT  
**Location:** Lead theater large  
**Speaker:** Désirée Young (Founder, VentureWalk Business Partners, LLC)

### **TL-148: Financing your international expansion**

Are you looking to expand your reach beyond your national borders? If so, this session is for you. During this breakout session, Desmond will address the number-one concern for companies looking to expand

globally: financing! "Where and how do I get the capital needed to expand the global reach and scope of my business?" is the question most asked by business owners and executives. This session will cover what you need to do to successfully prepare yourself and outline a variety of financing options and practical tips on how to go about getting funding for your international expansion.

**Thu July 30** 02:30 PM - 03:15 PM CDT

**Location:** Grow theater large

**Speaker:** Desmond Ryan (International Trainer,, Educator, and Mentor)

### **TL-149: Outlaws and orphans and warriors, Oh my! How archetypes can help power your brand and business**

Today, Harley-Davidson's customers are more likely to be preretirement Middle Americans than scruffy rebels, but the brand's enduring appeal is skillfully based on cultivating the badass image of the outlaw. Similarly, much of Southwest Airlines' success stems from embodying the jester, from the irreverent personality of its staff to its ability to poke fun at absurdities like the baggage fees and blackout dates of competitors. These brands succeed by using archetypes: universal themes hardwired into human beings that provide shortcuts to meaning. Adept use of archetypes can help your brand cut through the clutter by instantly connecting with a range of associations—and help you differentiate yourself vs. your competition by leveraging storylines we already recognize, understand, and value. In this engaging and informative talk, Tracy Carlson will help attendees understand what archetypes are and how to use them, drawing on compelling examples from brands familiar to all of us. She'll also highlight how our own invisible storylines may be binding us to stale stereotypes—and blinding us to fresh possibilities to create impact for our brands and businesses. Attendees will leave with new perspectives on their own situation and eagerness to explore new approaches.

**Thu July 30** 02:30 PM - 03:15 PM CDT

**Location:** Profit theater large

**Speaker:** Tracy Carlson (Founder, Right-Brain Brands)

### **TL-151: The phenomenon of mobile**

Mobile is growing so quickly and becoming a vital part of retail and marketing. This session will talk about how it's imperative to have a mobile optimized website, or customers will shop with your competitors. Plus, we'll discuss how mobile commerce is quickly becoming one of America's (and the world's) favorite ways to shop.

**Thu July 30** 02:30 PM - 03:15 PM CDT

**Location:** Differentiate theater large

**Speaker:** Rieva Lesonsky (CEO, GrowBiz Media)

### **HR-18: Sage HRMS: Sage Employer Solutions roadmap**

Listen as Sage Employer Solutions leaders discuss the roadmap for FY2015, FY2016, and beyond.

**Thu** 03:30 PM - 04:15 PM CDT

**July 30** **Location:** Learning commons 5D

**Speakers:** Mark Butje (Sr Dir, Product Marketing, Sage), Jennifer Dungan (Dir, Product Management, Sage), Craig Kampel (VP, Sales, Sage)



### **MM-107: Get more out of Excel and more insights into your business--Sage business intelligence solutions for Sage 300 ERP and Sage 500 ERP.**

Learn how the power of Excel with your Sage 300 ERP or Sage 500 ERP combined with Sage Intelligence solutions can leverage the data you have and give you new powerful reports and insights while streamlining your reporting requirements across the business. Learn more about when Sage Intelligence Reporting or Sage Enterprise Intelligence may be the best fit.

**Thu July 30** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 4B

**Speaker:** Mark Eddy (Sage Intelligence, Sage)



### **MM-118: Collections and cash management simplified in Sage 500 ERP**

Come see how managing collections and cash flow can be simplified using recent advancements to make your life easier.

**Thu July 30** 03:30 PM - 04:15 PM CDT  
**Location:** Interactive learning 4  
**Speaker:** Linda Cade (Sr. Product Manager, Sage)

### **MM-129: The predicting predicament: how accurate are your construction company forecasts?**

In today's economy, we all wish we had a crystal ball. What's our cash position going to be? Where will our profit margin end up at the end of our fiscal year? Find out how Sage can help you create more accurate forecasts to keep the health of your business on track with Sage construction and real estate solutions.

**Thu July 30** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 5A  
**Speakers:** Agnes Herba (Product Marketing Manager, Sage), Joselin Martin, CCIFP (Chief Financial Officer, Hayles and Howe, Inc.), Cory McFarlane, MBA (Chief Visionary, PinnacleCSG, Inc), Dawn Naisbitt (Accounting, R O Construction)

### **MM-165: How Sage customers are getting significant ROI from investing in Sage Inventory Advisor**

With the right tool and best practices around inventory management, your business can save time and money and improve customer service through optimizing inventory levels. Come hear specific success stories of how to differentiate your business and deliver a strong ROI.

**Thu July 30** 03:30 PM - 04:15 PM CDT  
**Location:** Profit theater small  
**Speakers:** David Johnson (CFO, Crossfield Products Corp.), Tony Sinton (CEO, NETSTOCK)  Full


### **MM-174: Sage 100 ERP: using Sage Payment Solutions**

Come to this session to see how easy it is to process credit card payments in Sage 100 ERP with Sage Exchange. If you've recently upgraded from pre-2013 or are still running on an older version, you'll also want to see the advantages of using Level 3 processing and explore the new third-party payments processing service.

**Thu July 30** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 4D  
**Speaker:** Jon Zimmermann (Product Mgr, Sr, Sage)

### **MM-197: Learn how to improve mobility with Sage ERP X3**

Join us to learn how the improved mobility with Sage ERP X3 has helped our customers succeed. Customers will tell their story in this session and answer questions you have.

**Thu July 30** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 4C  
**Speakers:** Chet Childers (Sales, Sage), Myra Hager (Vice President, ABC Compounding)  Full

### **MM-208: From quote to delivery**

Participate in this customer panel to discuss tips and tricks that take you from landing the quote to delivering the product on your customer's doorstep.

**Thu July 30** 03:30 PM - 04:15 PM CDT  
**Location:** Learning commons 4A

### **MM-239: Sage 500 ERP: making your system work the way you work with Customizer**

Learn about the options available for customizing Sage 500 ERP and which is the best one for you. We'll discuss and work through hands-on exercises to demonstrate the various ways you can modify tasks to match your processes to make the software work the way you work.

**Thu July 30** 03:30 PM - 04:15 PM CDT  
**Location:** Interactive learning 5  
**Speaker:** Darrick Coles (Dir, RD, Sage)

### **MM-389: Explore the Sage Enterprise Intelligence Excel Add-in (hands-on)**

Learn how the Sage Enterprise Intelligence Add-in for Microsoft Excel give users a dynamic and powerful way to access real-time information within Excel, directly from Sage ERP X3.

**Thu July 30** 03:30 PM - 04:15 PM CDT

**Location:** Interactive learning 1



**Speaker:** Karen Hayward (Trainer, Sage)

### **MM-407: Take your service department performance from good to great with Sage Service Operations**

Service and specialty contractors face a slew of complexities every day. From keeping up with paper work orders to timely and accurate billing and payroll--all while keeping customers happy. Join us for this product "deep dive" and see firsthand how Sage Service Operations can put vital information in your technicians' hands, eliminate duplicate data entry for your office staff, and give your customers tools to self-serve. The result: improved productivity, increased profits, and happy customers.

**Thu July 30** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 3B

**Speaker:** Vincent Pate (Inside Sales Engineer I, Sage)

### **SA-50: Getting real results with social media marketing in your accounting practice**

Learn how to build your practice and leverage the power of social media to acquire clients and get tons of attention. Learn how to build and leverage content and video. We'll discuss building the right website and search engine optimization (SEO). Learn about sales acquisition techniques, customer relationship management, email campaigns, analytics, pay per click marketing, and of course social media.

**Thu July 30** 03:30 PM - 04:15 PM CDT

**Location:** Differentiate theater small

**Speaker:** Eric Greenspan (Co-Founder/CEO/Chief Clever Officer/Dean of Delight, schoolofbookkeeping.com)

### **SA-61: For Sage Accountant Network Members: Partner roundtable discussion**

Back by popular demand, this highly energized session lets you converse with your peers, Partner Advisory Committee (PAC) members and Sage Accountant Advocates on topics of interest to Sage Accountant Network members. We love our accountants and bookkeepers and are always open to your feedback. During this interactive forum, tell us what's working, what's not and what we can do differently, and help design a program that is best suited to you.

**Thu July 30** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 2A

**Speaker:** Gary Olynik, CPA, CMA (Accountant Advocate, Sage Accountant Solutions, Sage)

### **SA-62: Recalibrating for relevance**

Are the services you're offering moving you toward or away from peak relevance to your clients? The accounting technology industry is in a state of transition from the old world to the new. This transition has led to inertia that is causing stress and anxiety for many in the accounting, bookkeeping, and consulting professions. However, for some this is providing a time of tremendous opportunity, and they are capitalizing on this unprecedented period of change. For others it's time to recalibrate right now before it's too late! Successful recalibration starts with understanding that a relevance curve exists for each of our businesses as well as the products and solutions we support, the vendors we partner with, and the industry we are a part of. Find out how you can assess where you are on the relevance curve and discover the three critical inflection points, one of which you need to stay right away from. Discover the six key steps for recalibration and how you can implement them in order to set sail to your future on a new and exciting relevance curve.


**Thu July 30** 03:30 PM - 04:15 PM CDT

**Location:** Learning commons 5B

**Speaker:** Clayton Oates (Chief Solutions Officer, QA Business)

### **TL-152: Understanding your financials and finding hidden ways to improve your business performance**

Financial statements tell the story of your business. They turn the ins and outs of your daily operations, the ebb and flow of goods and services, and the fruits of your labor into a set of score cards. But they are written in a foreign language. Attend this session to gain the keys to making sense of your financial statements. Learn where to look, what ratios to study, and how to make changes to improve your results.

**Thu July 30** 03:30 PM - 04:15 PM CDT  
**Location:** Lead theater large  
**Speaker:** Geni Whitehouse (Author, Speaker & Blogger, Even a Nerd Can Be Heard)  Full

### **TL-157: Doing business abroad: It's more than just the dos and don'ts**

This session will focus on a couple of basic competencies that one should have when interacting with people from other cultures. We will explore where culture comes from, and we will learn a couple of simple but effective techniques that will enable the participants to approach cross-border business opportunities with an open mindset that will set them up for success.

**Thu July 30** 03:30 PM - 04:15 PM CDT  
**Location:** Grow theater large  
**Speaker:** Barbara Boldt (Dynamic International Consultant, and Trainer)


### **TL-158: How and why the Canada Games have taken home the gold in Canadian pride over the past 50 years**

The Canada Games are a photo-finish, national anthem, top-of-the-podium, world-class kind of opportunity for Canadian youth. The Canada Games are where greatness begins. Inspiring dreams and building champions is the role that the Canada Games perform in sport for our future heroes and champions. We help create lasting legacies across Canada and stimulate national pride and volunteerism within communities while inspiring youth and our talented athletes to strive for excellence. The Canada Games are the cornerstone of Canadian sport that engage every province and territory, Canada's amateur sports associations, municipal, provincial/territorial, and federal levels of government and Canada's corporate community in an initiative that unites our entire nation. As we head toward our 50th anniversary in 2017, the property has changes lives at the grassroots and national level. Here are some key themes that may be discussed: strong, stable brand in Canada, 50-year anniversary, pride of Canada/Canada rallies around sport, support from all levels of government, building infrastructure and legacies . . . all these activities have helped to build a strong, recognizable, and respected Canadian brand, for a property unique to Canada. Partners--national, provincial, and local all work together--explain the value of the partners, specifically how Sage helps, 2015 is the year of sport, 2017 50-year anniversary/150 Canadian federation celebrations/centre of Canada, things the Canada Games has done to create that strong, respected brand, and how we have passed this on to partners.

**Thu July 30** 03:30 PM - 04:15 PM CDT  
**Location:** Profit theater large  
**Speakers:** Patrick Kenny (Director of Marketing and Communications, Canada Games Council), Tom Quinn (Chairman, Canada Games Council)

### **TL-160: Next two years: sales and marketing technology trends that will increase your cash flow**

These are only a few of the major trends that are having a significant impact on how we do business, generate leads, sell, and service our customers. We're looking at much change ahead. The next few years will bring big changes in the way we do business and how we drive revenues. What decisions should you be making now that will increase your company's brand awareness, value, and increase revenues over the next two years. It's not just Google, Facebook, Microsoft, and Apple that are leading the wave. It's Slack, GoDaddy, IFTTT, Sage, Insightly, LinkedIn, Nimble, Twitter. It's about the right kind of email marketing. Using video to connect to your prospects. Taking advantage of new voice, chat, and text tools to generate leads. Using mobile tools for search, payment, and relationship building. And a few tried and true sales processes that never go away. And of course there's the explosive growth of cloud-based technologies, led by customer relationship management. How are you touching your customers? Your prospects? How are you making sure nothing falls through the cracks? What workflows have you created to make sure customers never leave? How are smart marketers and business owners leveraging the latest services, applications, devices, and processes to maximize their revenues? Join Gene Marks, a national expert and columnist on sales, marketing, and customer relationship management, as he explains the latest sales and marketing trends will impact your business in the next few years.

**Thu July 30** 03:30 PM - 04:15 PM CDT  
**Location:** Differentiate theater large  
**Speaker:** Gene Marks (Columnist, Author & Small Business Owner, The Marks Group)  Full

### **SB-239: Dear Sage Accountants Network member . . .**

Sage 50 customers have lots of questions. In this panel session, we'll ask Sage 50 consultants how they would address some questions or concerns as asked by real Canadian small business owners. Moderated by your Sage 50 partner advisory Committee.