Sage Summit **2013**

Sage Accountants Network Session Recommendation Guide

In an effort to help Sage Accountant Network (SAN) members maximize their Sage Summit experience, we've put together a session recommendation guide based on the common business ambitions shared by our members.

Read the Personas outlined below, assess which profile you most relate to, and view the color-coded Session Recommendation Guide. Please note, these are not all of the sessions offered at Sage Summit 2013. For a full list of sessions, visit: www.SageSummit.com

The recommendations below are just that: recommendations. Feel free to mix and match sessions within tracks.

Personas

"The Newbie"

I'm new to Sage 50 Accounting. Although I have some background and experience, I would like to better understand Sage, the Sage Accountants Network, and some of the core functionality I should utilize with my clients. As a new member, I'm looking to network, make new friends, and establish who my "go-to" people will be.

"The Grower"

I am looking to expand my client base. I need to learn better ways to market to new prospective clients, including how to create marketing messages that resonate and a web presence that works to capture leads. I feel like I understand the Sage 50 solution, but I need to understand how to market consultative services.

"The Overworked"

I need to figure out how to make the same (or more!) revenue, without working more hours. As it is, I'm working 50+ hours each week; work-life balance is a dream I only experience with my eyes closed, and I'm feeling stretched too thin. What's worse than that, I feel my clients are feeling the strain, and I'm worried about retention becoming an issue long term.

"The Innovator"

I consider myself to be leading edge, and I'd like to take my firm to the next level. I'm interested in connected services, going paperless, social media, and all things "next gen." I have passion and excitement for thinking outside the box and like to look at things from different angles.

"The Teacher"

My business is built on training and education of software solutions and business concepts, not on providing bookkeeping services. I focus my time on developing speaking skills and establishing better ways of communicating or sharing information.

Schedule

Sunday, July 21—Preconference

Time	The Newbie	The Grower	The Overworked	The Innovator	The Teacher
1:00 p.m.–3:00 p.m.	**P-150:** Sage 50 2013—Crossfit 50	**P-150:** Sage 50 2013—Crossfit 50	**P-150:** Sage 50 2013—Crossfit 50	**P-150:** Sage 50 2013—Crossfit 50	**P-150:** Sage 50 2013—Crossfit 50
3:00 p.m.–3:30 p.m.	Networking Break				
3:30 p.m.–5:30 p.m.	**P-150:** Sage 50 2013—Crossfit 50	**P-150:** Sage 50 2013—Crossfit 50	**P-150:** Sage 50 2013—Crossfit 50	**P-150:** Sage 50 2013—Crossfit 50	**P-150:** Sage 50 2013—Crossfit 50
5:30 p.m.–6:30 p.m.	Expo Business Partner Meet and Greets				
6:30 p.m.–9:30 p.m.	Sage Marketplace Live Expo Welcome Reception				

Schedule

Monday, July 22—Partner Days

Time	The Newbie	The Grower	The Overworked	The Innovator	The Teacher
7:30 a.m.–8:30 a.m.	Breakfast				
8:30 a.m.–10:00 a.m.	CEO Business Partner Keynote				
10:00 a.m.–10:30 a.m.	Coffee Break				
10:30 a.m.–12:00 p.m.	Business Partner Super Sessions	Business Partner Super Sessions	Business Partner Super Sessions	Business Partner Super Sessions	Business Partner Super Sessions
12:00 p.m.–2:00 p.m.	Expo and Lunch				
2:00 p.m.–3:00 p.m.	**P-142:** Prioritization of New Features in Sage 50 Accounting—U.S. Edition	**P-5:** Twitter 101–What's Twitter? Getting Started and the Basics of Twitter—BYOD	**P-105:** Office 2013: What's in It for Me	**P-131:** Sage One Overview: How It Fits in Your Portfolio	**P-105:** Office 2013: What's in It for Me
3:15 p.m.–4:15 p.m.	**P-132:** Sage 50—U.S. Edition Product Vision and Open Discussion	**P-6:** Twitter 201—I'm on Twitter . . . Now It's Time to Unlock the Power! BYOD	**P-106:** Increasing Revenue and Client	**P-106:** Increasing Revenue and Client	**P-145:** What's New Sage 50—U.S. Edition Intelligence Reporting 2014
4:30 p.m.–5:30 p.m.	**P-107:** Best Practices of High-Performing Accounting, Bookkeeping, and Consulting Firms	**P-107:** Best Practices of High-Performing Accounting, Bookkeeping, and Consulting Firms	**P-107:** Best Practices of High-Performing Accounting, Bookkeeping, and Consulting Firms	**P-104:** Avoiding Latrogenic Consulting	**P-125:** Release the Shackles of Bad Presentations
5:30 p.m.–7:30 p.m.	Sage Marketplace Live Expo Reception				
7:30 p.m.–11:00 p.m.	Business Partner Party				

Schedule

Tuesday, July 23—Partner and Customer Day

Time	The Newbie	The Grower	The Overworked	The Innovator	The Teacher
7:30 a.m.–8:30 a.m.	Breakfast				
8:30 a.m.–9:30 a.m.	**P-147:** Sage 50 Accounting–U.S. Edition Tips and Tricks	**P-108:** Tech Update 2013	**P-196:** Life Balance	**P-133:** Sage 50—U.S. Edition Payments Roadmap in the Small Business Landscape	**P-196:** Life Balance
9:45 a.m.–11:00 a.m.	**P148:** Sage 50—U.S. Edition Intelligence Reporting: Financial Workshop	**P-110:** Excel's PowerPivot and Power View: A Dynamic Duo!	**P109:** Top Ten Business Tips	**P-116:** Mobile and Cloud Solutions	**P-134:** Sage Advisor for Sage 50
11:15 a.m.–12:30 p.m.	**P-141:** Sage 50—U.S. Edition Automated Deployment (Simplifying Install, Upgrade, and Update)	**P-111:** Excel Guru's Toolbox	**P-111:** Excel Guru's Toolbox	**P-5:** Twitter 101—What's Twitter? Getting Started and the Basics of Twitter—BYOD	**P-141:** Sage 50—U.S. Edition Automated Deployment (Simplifying Install, Upgrade, and Update)
12:30 p.m.–2:00 p.m.	Expo and Lunch				
2:00 p.m.–3:00 p.m.	**C-172:** Designing Financial Statements in Sage 50 Accounting–U.S. Edition	**P-143:** Marketing Is Dead—How You Can Restore Your Marketing Efforts to Reach Your Prospects	**C-172:** Designing Financial Statements in Sage 50 Accounting–U.S. Edition	**P-143:** Marketing Is Dead—How You Can Restore Your Marketing Efforts to Reach Your Prospects	**C-172:** Designing Financial Statements in Sage 50 Accounting–U.S. Edition
3:30 p.m.–4:00 p.m.	Refreshment Break				
4:00 p.m.–6:30 p.m.	Sage City				
Evening	Open Evening				

Schedule

Wednesday, July 24—Partner and Customer Day

Time	The Newbie	The Grower	The Overworked	The Innovator	The Teacher
6:45 a.m.–8:00 a.m.	National Harbor 5k Fun Run/Walk				
7:30 a.m.–8:30 a.m.	Breakfast				
8:30 a.m.–10:00 a.m.	**P-147:** Sage 50 Accounting–U.S. Edition Tips and Tricks	**C-27:** Public Relations: It's up to You!	**C-184:** Making Your Business Antifragile	**C-184:** Making Your Business Antifragile	**P-133:** Sage 50—U.S. Edition Payments Roadmap in the Small Business Landscape
10:00 a.m.– 10:30 a.m.	Coffee				
10:30 a.m.–12:00 p.m.	**C-185:** Creating Strategy in a Small Business	**C-65:** Building a Mobile Experience for Your Customers	**C-185:** Creating Strategy in a Small Business	**C-65:** Building a Mobile Experience for Your Customers	**C-174:** Sage 50—U.S. Edition Intelligence Reporting Financial Workshop
12:00 p.m.–2:00 p.m.	Expo and Lunch				
2:00 p.m.–3:15 p.m.	**C-175:** Microsoft Office Integration with Sage 50 Accounting—U.S. Edition	**C-62:** Effective Ways to Benchmarking Your Website KPIs	**C-59:** Intro to Online Usability Testing	**C-183:** Top Ten Business Myths	**C-175:** Microsoft Office Integration with Sage 50 Accounting—U.S. Edition
3:15 p.m.–3:45 p.m.	Expo and Refreshment Break				
3:45 p.m.–4:45 p.m.	**C-177:** Customizing Sage 50 Accounting—U.S. Edition	**C-186:** Panel: The Strategic IT Leader	**C-177:** Customizing Sage 50 Accounting—U.S. Edition	**C-186:** Panel: The Strategic IT Leader	**C-177:** Customizing Sage 50 Accounting—U.S. Edition
5:00 p.m.–6:30 p.m.	Sage Marketplace Live Expo Reception				
7:30 p.m.–11:00 p.m.	Sage Presents: Night at the American History Museum				

Schedule

Thursday, July 25— Partner and Customer Day

Time	The Newbie	The Grower	The Overworked	The Innovator	The Teacher
7:30 a.m.–8:30 a.m.	Breakfast				
8:30 a.m.–12:15 p.m.	Peer-to-Peer Breakout Sessions				
10:00 a.m.–3:00 p.m.	Sage Marketplace Live Expo				
10:00 a.m.–10:45 a.m.	Coffee Break in the Expo				
12:00 p.m.–2:00 p.m.	Expo and Lunch				
2:00 p.m.–3:00 p.m.	**C-178:** Maintaining Your Sage 50 Accounting—U.S. Edition Company Data	**C-188:** On Why Managing Sucks and How to Fix It	**C-10:** Social Media for the Antisocial	**C-188:** On Why Managing Sucks and How to Fix It	**C-178:** Maintaining Your Sage 50 Accounting—U.S. Edition Company Data
3:15 p.m.–4:15 p.m.	**C-179:** Customizing Sage 50 Accounting—U.S. Edition Forms	**C-189:** Initiating a Project in a Small Business	**C-189:** Initiating a Project in a Small Business	**C-189:** Initiating a Project in a Small Business	**C-168:** Sage 50 Accounting—U.S. Edition: Tips and Tricks From a Pro
4:30 p.m.–5:30 p.m.	**C-180:** Time-Saving Tips and Tricks in Sage 50 Accounting—U.S. Edition	**C-9:** The Power of Video in Marketing, Sales, and Customer Service	**C-201:** In Defense of Business	**C-9:** The Power of Video in Marketing, Sales, and Customer Service	**C-9:** The Power of Video in Marketing, Sales, and Customer Service
Evening	Open Evening				

Schedule

Friday, July 26—Partner and Customer Day					
Time	**The Newbie**	**The Grower**	**The Overworked**	**The Innovator**	**The Teacher**
7:30 a.m.–8:30 a.m.	Breakfast and Closing Remarks				
8:30 a.m.–10:00 a.m.	**C-181:** Sage 50 Accounting—U.S. Edition Time Ticket Essentials	**C-125:** Sage CRM: The Five Biggest Business Challenges and How Sage CRM Can Solve Them	**C-181:** Sage 50 Accounting—U.S. Edition Time Ticket Essentials	**C125:** Sage CRM: The Five Biggest Business Challenges and How Sage CRM Can Solve Them	**C-181:** Sage 50 Accounting—U.S. Edition Time Ticket Essentials
10:00 a.m.–10:30 a.m.	Coffee Break				
10:30 a.m.–12:00 p.m.	**C-182:** What's New in Sage 50—U.S. Edition Intelligence Reporting 2014	**C-182:** What's New in Sage 50—U.S. Edition Intelligence Reporting 2014	**C-182:** What's New in Sage 50—U.S. Edition Intelligence Reporting 2014	**C-182:** What's New in Sage 50—U.S. Edition Intelligence Reporting 2014	**P-150:** Sage 50 2013—Crossfit 50
	Conference Concludes				

Session Descriptions

The Newbie

P-142 **Prioritization of New Features in Sage 50 Accounting—U.S. Edition | Presenter: Matt Russell**
This session is a new twist of the Product Roundtable. Attendees will receive a demo of the IdeaScale tool, which is used to track product recommendations so reviewers can vote on the importance of each suggestion. Not only will attendees learn how to leverage this tool themselves, they will also review some ideas in the tool in regard to their own business.

P-132 **Sage 50—U.S. Edition Product Vision and Open Discussion | Presenter: Scott Munro**
The roadmap starts with a specific look at Sage 50 Accounting 2014 (formerly Peachtree) and beyond to the future direction of this product line. Attendees will learn the vision Sage has regarding SaaS, mobility, and cloud. Plus, attendees can provide feedback to Sage 50 product managers about how these changes affect you and your clients.

P-107 **Best Practices of High-Performing Accounting, Bookkeeping, and Consulting Firms | Presenter: Jennifer Warawa**
There is no denying it—the best simply do it better than (and different from!) the rest. What truly separates high-performing firms from the average ones? Jennifer Warawa from Sage North America will be sharing research, insights, and tips regarding what high-performing accounting, bookkeeping, and consulting firms do differently and how you can apply these concepts to drive measurable results. Even very successful businesses have areas they can improve upon.

P-147 **Sage 50 Accounting—U.S. Edition Tips and Tricks | Presenter: Matt Russell**
As technology changes, so should our distribution model. Attend this session to understand the changes ahead for how we deliver and activate Sage products and updates. Imagine an activation process that didn't involve digging through emails, remembering ID codes, and pulling out your hair!

P-148 **Sage 50—U.S. Edition Intelligence Reporting: Financial Workshop | Presenter: David Polk**
Do not miss this session on important tips and instruction on using Sage 50 Intelligence Reporting! Topics in this session will cover Financial Report Designer enhancements, custom mapping and custom row reporting, working with report trees and account filtering, and creating distribution instructions and automated scheduling. This session is a must-attend for report writing enthusiasts!

P-141 **Sage 50—U.S. Edition Automated Deployment (Simplifying Install, Upgrade, and Update) | Presenter: Debbie Krebs**
As technology changes, so should our distribution model. Attendees will learn about the changes ahead for how we deliver and activate Sage products and updates. Imagine an activation process that didn't involve digging through emails, remembering ID codes, and pulling out your hair!

Session Descriptions

C-172 Designing Financial Statements in Sage 50 Accounting—U.S. Edition | Presenter: Rick Pope

Designing a financial statement is one of the more advanced procedures in Sage 50 and can be a complex task for those who do not first acquaint themselves with the design tools available.

P-147 Sage 50 Accounting—U.S. Edition Tips and Tricks | Presenter: Matt Russell

Are you using Sage 50 Accounting—U.S. Edition (formerly Peachtree) as efficiently as possible? Over the years, there have been a number of enhancements—both big and small—made to improve the software's ease of use. Even the most avid Sage 50 user may walk away from this session with a new trick or two!

C-185 Creating Strategy in a Small Business | Presenter: Ed Kless

This session will be dedicated to the possibility that 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 to open a dialogue about how best to go about creating a strategy for your small organization by Ed Kless, Sage senior director of partner development and strategy, who will facilitate this session.

C-175 Microsoft Office Integration With Sage 50 Accounting—U.S. Edition | Presenter: Rick Pope

Sage 50 includes many features that integrate with Microsoft Office, offering you enhanced ways to use Sage 50 with the Microsoft products that you use every day.

C-177 Customizing Sage 50 Accounting—U.S. Edition | Presenter: Rick Pope

There are many popular (and not so well known) settings and features in Sage 50 that help you tailor your Sage 50 experience for maximum productivity.

C-178: Maintaining Your Sage 50 Accounting—U.S. Edition Company Data | Presenter: Rick Pope

Making regular backups and maintaining an error-free database are essential steps in keeping your company information dependable and in top-top shape.

C-179 Customizing Sage 50 Accounting—U.S. Edition Forms | Presenter: Rick Pope

An easy-to-use form designer is available in Sage 50 that lets you create your own professional-looking forms, including custom sales invoices, purchase orders, checks, and more.

C-180 Time-Saving Tips and Tricks in Sage 50 Accounting—U.S. Edition | Presenter: Rick Pope

Your time is valuable! Would you like to discover ways to minimize the time you spend entering data into Sage 50? Sage 50 offers many enhancements and tools that can help you save time when processing your daily transactions, including memorized transaction templates, automatic recurring entries, and more!

Session Descriptions

C-181 Sage 50 Accounting—U.S. Edition Time Ticket Essentials | Presenter: Rick Pope

Sage 50 provides time and expense ticket features that help you track and bill for the time your vendors and employees spend when working with your customers.

C-182 What's New in Sage 50—U.S. Edition Intelligence Reporting 2014 | Presenter: David Polk

It's time to refresh your report writing skills and learn what's new in Sage 50—U.S. Edition Intelligence Reporting. Features covered in this session include custom mapping and row reporting, right-click drill down, current month layout, and distribution. If you're already using this report writing tool or if you'd like to see it for the first time, this session is all about the latest and greatest!

The Grower

P-5 Twitter 101—What's Twitter? Getting Started and the Basics of Twitter—BYOD | Presenter: Brian Webb

You've heard of Twitter and know that it can help you with networking and can grow your business, but you don't know how or where to start.

P-6 Twitter 201—I'm on Twitter . . . Now It's Time to Unlock the Power!—BYOD | Presenter: Brian Webb

You have a Twitter account and you occasionally tweet, but you want to learn how to unlock the power of social media.

P-107 Best Practices of High-Performing Accounting, Bookkeeping, and Consulting Firms | Presenter: Jennifer Warawa

There is no denying it—the best simply do it better than (and different from!) the rest. What truly separates high-performing firms from the average ones? Jennifer Warawa from Sage North America will be sharing research, insights, and tips regarding what high-performing accounting, bookkeeping, and consulting firms do differently, and how you can apply these concepts to drive measurable results. Even very successful businesses have areas they can improve upon.

P-108 Tech Update 2013 | Presenter: Randy Johnston, K2

In 2013, hardware technologies will settle down while the effects of software changes, Windows 8, and Office 2013 will begin to have an impact on organizations of all sizes. This, coupled with trends in the cloud, security, and other evolving technologies, means the overall pace of change will continue full throttle.

P-110 Excel's PowerPivot and Power View: A Dynamic Duo! | Presenter: Brian Tankersley, K2

Two new Excel features—PowerPivot and Power View—provide unparalleled options for analyzing data and preparing interactive reports. With PowerPivot, you can make your PivotTables even more potent, while Power View offers visualization techniques to enhance the appearance of your reports.

Session Descriptions

P-111 Excel Guru's Toolbox | Presenter: Brian Tankersley, K2

Beyond PivotTables, which many users consider Excel's most powerful feature, Excel has many other great features and add-ins.

P-143 Marketing Is Dead—How You Can Restore Your Marketing Efforts to Reach Your Prospects | Presenter: Apryl Hanson

Traditional marketing is dead. Many of us know it, but we continue to market with the age-old efforts that have worked in the past as we get diminishing results. We continue to spend, and when it doesn't work, we cut out marketing from our organization or we continue to spend with little to no return. Is there a better way? We think so. In one of the most commented-on articles on Harvard Business Review's blog, Bill Lee talks about ways that you can change your marketing paradigm and shift into marketing that works. If you'd like to discuss his article and how it applies to your business attend this lively session with discussions led by two top marketers—Imran Syed of Baass and Apryl Hanson of Blytheco.

C-27 Public Relations: It's up to You! | Presenter: Amanda DeFuria

Whether you are thinking about developing a public relations program or want to enhance your current PR program, this panel session is for you. Join this panel of experts to learn or refresh on the basics, how to engage with media, how to build your presence, and how to use social media to further your PR program. Remember, PR is up to you!

C-65 Building a Mobile Experience for Your Customers | Presenter: TBD

You've heard the statistics: More than ever, your website visitors—your potential customers—are using mobile phones and tablets to view your website, and those numbers keep increasing. But are you and your website ready? And more importantly, what's involved in creating a mobile experience?

C-62 Effective Ways to Benchmarking Your Website KPIs | Presenter: Bao Nguyen

Website performance data, or web analytics data, can overwhelm or undermine your efforts to improve the usability level of your customers. How effectively you decipher web data can be the difference between opportunity loss and opportunity gain. Learn how to segment the abundant amount of web data into key areas for your website and create a strong benchmarking foundation to optimize online user experience.

C-186 Panel: The Strategic IT Leader | Presenter: Ed Kless

This panel session is dedicated to the possibility that IT leaders can provide more strategic value to their organizations than they currently do. Providing this value is hard work because it requires IT leaders and other in their organization to think differently from how they have in the past. If you are an IT leader or you have one in your organization and would like increasing the value provided, you are invited to join in this conversation at this session led by the Sage senior director of partner development and strategy, Ed Kless.

Session Descriptions

C-188: On Why Managing Sucks and How to Fix It | Presenter: John Shaver

This session is dedicated to the possibility that managers can improve their lives and the lives of those they manage by implementing a results-only work environment (ROWE) in their companies. Implementing a ROWE is hard because it requires managers to think in terms of real results rather than focusing on the efforts of their people. If you are interested in learning more, you are invited to participate in a conversation led by John Shaver of Aries Technology Group, a Sage business partner who has implemented a ROWE in his organization.

C-189 Initiating a Project in a Small Business | Presenter: Ed Kless

This session will be dedicated to the possibility that in small organizations or teams, projects are rarely initiated properly and thereby achieve less than optimal results. Initiating internal projects properly is hard work and not for everyone, as it requires us to think differently from how we have in the past. You are hereby invited to open a dialogue about how best to initiate new projects in your small organization by Ed Kless, who will facilitate this session.

C-9 The Power of Video in Marketing, Sales, and Customer Service | Presenter: Tommy Williams

Come learn about the power of video. It is a valuable tool in marketing, sales, customer service, and even reporting software issues. This session will include a discussion about lessons learned, dos and don'ts, screen recording/video editing apps, video sharing sites, knowing your target audience, and how to get past the fear of being in front of the camera.

C-125 Sage CRM: The Five Biggest Business Challenges and How Sage CRM Can Solve Them | Presenter: Travis Taylor

Why CRM? Come to this session and learn how Sage CRM can help to solve your biggest business challenges. This session is a must if you are looking to learn how the Sage CRM features and functions are designed to maximize your company's efficiency. We'll show you key features in action that will give you immediate benefits and add value to your business.

C-182 What's New in Sage 50—U.S. Edition Intelligence Reporting 2014 | Presenter: David Polk

It's time to refresh your report writing skills and learn what's new in Sage 50—U.S. Edition Intelligence Reporting. Features covered in this session include custom mapping and row reporting, right-click drill down, current month layout, and distribution. If you're already using this report writing tool or if you'd like to see it for the first time, this session is all about the latest and greatest!

Session Descriptions

The Overworked

P-105 **Office 2013: What's in It for Me | Presenter: Randy Johnston, K2**
Ready or not, Office 2013 has arrived! With Office 2013, Microsoft unveiled a number of new features sure to improve productivity across all of Office's familiar applications.

P-106 **Increasing Revenue and Client Engagement in Your Firm | Presenter: Ed Kless**
This session is dedicated to the possibility that a small accounting or bookkeeping firm can serve its customers (not clients, as the session will explain) better by creating a different type of relationship with them—a better type of relationship. Creating this new relationship is hard work (and not for everyone) because it requires thinking about the business model differently from how we have in the past. If you believe you are able to think about your firm in a new way, you are invited to join in the dialogue about this idea by attending this session facilitated by Ed Kless, Sage senior director of partner development and strategy.

P-107 **Best Practices of High-Performing Accounting, Bookkeeping, and Consulting Firms | Presenter: Jennifer Warawa**
There is no denying it—the best simply do it better than (and different from!) the rest. What truly separates high-performing firms from the average ones? Jennifer Warawa from Sage North America will be sharing research, insights, and tips regarding what high-performing accounting, bookkeeping, and consulting firms do differently, and how you can apply these concepts to drive measurable results. Even very successful businesses have areas they can improve upon.

P-196 **Life Balance | Presenter: Enayet Jiwani**
Born in the East and educated in the West, Enayet brings with him his real-life experience of perceiving the world through multiple lenses of culture, spirituality, and compassion. He has been a practitioner of yoga, meditation, introspection, and journey of self-evolution and development. He is a senior executive leading large teams to professional success and along the way, mentoring and coaching many of his employees to personal success. In this exploration of life balance, you will learn about the power of the mind and techniques to harvest that power. Transform your thinking about your emotional and physical well-being. Learn to manage stress and finding balance in your daily life. Understand the connection among mind, body, and spirit and harmonize that connection to lead a successful personal and professional life.

P-109 **Top Ten Business Myths | Presenter: Ed Kless**
This session is dedicated to the possibility that many myths exist about business, and it would be better to rid ourselves of these ideas. Thinking about these myths is hard 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 interesting in having a conversation about business myths, you are invited to attend this session facilitated by Ed Kless, Sage senior director of partner development and strategy.

Session Descriptions

P-111 **Excel Guru's Toolbox | Presenter: Brian Tankersley, K2**
Beyond PivotTables, which many users consider Excel's most powerful feature, Excel has many other great features and add-ins.

C-172 **Designing Financial Statements in Sage 50 Accounting—U.S. Edition | Presenter: Rick Pope**
Designing a financial statement is one of the more advanced procedures in Sage 50 and can be a complex task for those who do not first acquaint themselves with the design tools available.

C-184 **Making Your Business Antifragile | Presenter: Ed Kless**
This session is dedicated to the possibility that we can apply the work of Nicholas Taleb, author of *Antifragile*, to business. Thinking this through is hard work because it requires the ability to take a difficult and abstract concept (antifragility) and apply to the hard ideas of business. If you enjoy abstract (in other words, way out of the box) thinking, please join in this panel conversation led by Ed Kless, Sage senior director of partner development and strategy.

C-185 **Creating Strategy in a Small Business | Presenter: Ed Kless**
This session will be dedicated to the possibility that 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 to open a dialogue about how best to go about creating a strategy for your small organization by Ed Kless, Sage senior director of partner development and strategy, who will facilitate this session.

C-59 **Intro to Online Usability Testing | Presenter: Bryant Young**
Know you should be testing your website, but not sure where to start? Have some ideas on how to improve your site, but not sure how to get there? In this session, you will learn how to test ideas to help optimize your site and increase onsite conversions. We will also cover the basics of setting up, running, and evaluating online usability tests.

C-177 **Customizing Sage 50 Accounting—U.S. Edition | Presenter: Rick Pope**
There are many popular (and not so well known) settings and features in Sage 50 that help you tailor your Sage 50 experience for maximum productivity.

C-10 **Social Media for the Antisocial | Presenter: Robert Wood**
Come join a panel of folks who were not socially outgoing by nature and learn how social media has helped them overcome those tendencies. As social media friendships are formed, the basis for collaboration develops. Specific topics will include social business tools, Google Hangouts, Facebook, Twitter, and LinkedIn.

Session Descriptions

C-189 **Initiating a Project in a Small Business | Presenter: Ed Kless**
This session will be dedicated to the possibility that in small organizations or teams, projects are rarely initiated properly and thereby achieve less than optimal results. Initiating internal projects properly is hard work and not for everyone, as it requires us to think differently from how we have in the past. You are hereby invited to open a dialogue about how best to initiate new projects in your small organization by Ed Kless, who will facilitate this session.

C-201 **In Defense of Business | Presenter: Ed Kless**
This session is dedicated to the possibility that business is a noble yet frequently rebuked calling. With the constant bombardment from the media to the contrary, it is oftentimes difficult to see how businesses profit not only themselves, but all of society. So much so that the notion of having to "give back" to the community is redundant. If you are interested in learning more about this defense of business and the market, please join in the conversation led by Ed Kless, Sage senior director of partner development and strategy.

C-181 **Sage 50 Accounting—U.S. Edition Time Ticket Essentials | Presenter: Rick Pope**
Sage 50 provides time and expense ticket features that help you track and bill for the time your vendors and employees spend when working with your customers.

C-182 **What's New in Sage 50—U.S. Edition Intelligence 2014 | Presenter: David Polk**
It's time to refresh your report writing skills and learn what's new in Sage 50—U.S. Edition Intelligence Reporting. Features covered in this session include custom mapping and row reporting, right-click drill down, current month layout, and distribution. If you're already using this report writing tool or if you'd like to see it for the first time, this session is all about the latest and greatest!

Session Descriptions

The Innovator

P-131 **Sage One Overview: How It Fits in Your PortfolioP-113 | Presenter: Alistair Ellis**
Did you see the debut of Sage One at Sage Summit last year? Since then, it's been on radio and TV, undergone significant improvements, and is now positioned for growth in the year ahead. This is your opportunity to see the latest version of Sage One in action and to get a preview of what's next. By attending, you'll learn about the types of businesses for which Sage One was designed, the problems it solves, and when it is the right fit for your clients. Sage One is truly a global initiative for Sage, so you'll also see how it's being introduced in a growing list of countries and how it's all being coordinated.

P-106 **Increasing Revenue and Client Engagement in Your Firm | Presenter: Ed Kless**
This session is dedicated to the possibility that a small accounting or bookkeeping firm can serve its customers (not clients, as the session will explain) better by creating a different type of relationship with them—a better type of relationship. Creating this new relationship is hard work (and not for everyone) because it requires thinking about the business model differently from how we have in the past. If you believe you are able to think about your firm in a new way, you are invited to join in the dialogue about this idea by attending this session facilitated by Ed Kless, Sage senior director of partner development and strategy.

P-104 **Avoiding Latrogenic Consulting | Presenter: Ed Kless**
This session is dedicated to the possibility that consultants should adhere to the Hippocratic oath of Primum non nocere, a Latin phrase that means "First, do no harm." This is more difficult then it seems because we have been "trained" to intervene. If you are interested in having a dialogue about this idea, you are invited to attend this session led by Ed Kless, Sage senior director of partner development and strategy.

P-133 **Sage 50—U.S. Edition—Payments Roadmap in the Small Business Landscape | Presenter: Jim Collins**
It's all about efficiency and cashflow in the small business landscape. Attendees will learn about the Sage 50 offerings related to paying vendors, remittances, and employees; receiving payments; and how integrated solutions can help businesses move money with greater speed and accuracy and fewer hassles.

P-116 **Mobile and Cloud Solutions | Presenter: Matt Russell**
In this session product management will provide the roadmap for the Sage Small Business mobility strategy with tablets and phones. Attendees will also learn about some of the online connected services planned to integrate with the Sage 50 desktop software. Attend this session for a preview of our forthcoming solutions and get a sneak peak at the future!

Session Descriptions

P-5 **Twitter 101—What's Twitter? Getting Started and the Basics of Twitter—BYOD | Presenter: Brian Webb**
You've heard of Twitter and know that it can help you with networking and can grow your business, but you don't know how or where to start.

P-143 **Marketing Is Dead—How You Can Restore Your Marketing Efforts to Reach Your Prospects | Presenter: Apryl Hanson**
Traditional marketing is dead. Many of us know it, but we continue to market with the age old efforts that have worked in the past as we get diminishing results. We continue to spend, and when it doesn't work, we cut out marketing from our organization or we continue to spend with little to no return.
Is there a better way? We think so. In one of the most commented-on articles on Harvard Business Review's blog, Bill Lee talks about ways that you can change your marketing paradigm and shift into marketing that works. If you'd like to discuss his article and how it applies to your business, attend this lively session with discussions led by two top marketers—Imran Syed of Baass and Apryl Hanson of Blytheco.

C-184 **Making Your Business Antifragile | Presenter: Ed Kless**
This session is dedicated to the possibility that we can apply the work of Nicholas Taleb, author of *Antifragile*, to business. Thinking this through is hard work because it requires the ability to take a difficult and abstract concept (antifragility) and apply to the hard ideas of business. If you enjoy abstract (in other words, way out of the box) thinking, please join in this panel conversation led by Ed Kless, Sage senior director of partner development and strategy.

C-65 **Building a Mobile Experience for Your Customers | Presenter: TBD**
You've heard the statistics: More than ever, your website visitors—your potential customers—are using mobile phones and tablets to view your website, and those numbers keep increasing. But are you and your website ready? And more importantly, what's involved in creating a mobile experience?

C-183 **Top Ten Business Myths | Presenter: Ed Kless**
This session is dedicated to the possibility that many myths exist about business and it would be better to rid ourselves of these ideas. Thinking about these myths is hard 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 interesting in having a conversation about business myths, you are invited to attend this session facilitated by Ed Kless, Sage senior director of partner development and strategy.

C-186 **Panel: The Strategic IT Leader | Presenter: Ed Kless**
This panel session is dedicated to the possibility that IT leaders can provide more strategic value to their organizations than they currently do. Providing this value is hard work because it requires IT leaders and other in their organization to think differently from how they have in the past. If you are an IT leader or you have one in your organization and would like increasing the value provided, you are invited to join in this conversation at this session led by the Sage senior director of partner development and strategy, Ed Kless.

Session Descriptions

C-188: On Why Managing Sucks and How to Fix It | Presenter: John Shaver

This session is dedicated to the possibility that managers can improve their lives and the lives of those they manage by implementing a results-only work environment (ROWE) in their companies. Implementing a ROWE is hard because it requires managers to think in terms of real results rather than focusing on the efforts of their people. If you are interested in learning more, you are invited to participate in a conversation led by John Shaver of Aries Technology Group, a Sage business partner who has implemented a ROWE in his organization.

C-189 Initiating a Project in a Small Business | Presenter: Ed Kless

This session will be dedicated to the possibility that in small organizations or teams, projects are rarely initiated properly and thereby achieve less than optimal results. Initiating internal projects properly is hard work and not for everyone, as it requires us to think differently from how we have in the past. You are hereby invited to open a dialogue about how best to initiate new projects in your small organization by Ed Kless, who will facilitate this session.

C-9 The Power of Video in Marketing, Sales, and Customer Service | Presenter: Tommy Williams

Come learn about the power of video. It is a valuable tool in marketing, sales, customer service, and even reporting software issues. This session will include a discussion about lessons learned, dos and don'ts, screen recording/video editing apps, video sharing sites, knowing your target audience, and how to get past the fear of being in front of the camera.

C-125 Sage CRM: The Five Biggest Business Challenges and How Sage CRM Can Solve Them | Presenter: Travis Taylor

Why CRM? Come to this session and learn how Sage CRM can help to solve your biggest business challenges. This session is a must if you are looking to learn how the Sage CRM features and functions are designed to maximize your company's efficiency. We'll show you key features in action that will give you immediate benefits and add value to your business.

C-182 What's New in Sage 50—U.S. Edition Intelligence Reporting 2014 | Presenter: David Polk

It's time to refresh your report writing skills and learn what's new in Sage 50—U.S. Edition Intelligence Reporting. Features covered in this session include custom mapping and row reporting, right-click drill down, current month layout, and distribution. If you're already using this report writing tool or if you'd like to see it for the first time, this session is all about the latest and greatest!

Session Descriptions

The Teacher

P-105 **Office 2013: What's in It for Me | Presenter: Randy Johnston, K2**

Ready or not, Office 2013 has arrived! With Office 2013, Microsoft unveiled a number of new features sure to improve productivity across all of Office's familiar applications.

P-145 **What's New Sage 50—U.S. Edition Intelligence Reporting 2014 | Presenter: David Polk**

It's time to refresh your report writing skills and learn what's new in Sage 50—U.S. Edition Intelligence Reporting. Features covered in this session include custom mapping and row reporting, right-click drill down, current month layout, and distribution. If you're already using this report writing tool or if you'd like to see it for the first time, this session is all about the latest and greatest!

P-125 **Release the Shackles of Bad Presentations | Presenter: Gregory Dyer**

Open the doors to improving your communication skills whether you are consulting, training, or just speaking. This interactive session provides you with worthwhile concepts and tools to ensure your next presentation is not dull and boring. Come have some fun and learn some best practices for your next presentation.

P-196 **Life Balance | Presenter: Enayet Jiwani**

Born in the East and educated in the West, Enayet brings with him his real-life experience of perceiving the world through multiple lenses of culture, spirituality, and compassion. He has been a practitioner of yoga, meditation, introspection, and journey of self-evolution and development. He is a senior executive leading large teams to professional success and along the way, mentoring and coaching many of his employees to personal success. In this exploration of life balance, you will learn about the power of the mind and techniques to harvest that power. Transform your thinking about your emotional and physical well-being. Learn to manage stress and finding balance in your daily life. Understand the connection among mind, body, and spirit and harmonize that connection to lead a successful personal and professional life.

P-134 **Sage Advisor for Sage 50 | Presenter: Rob Houser**

Sage Advisor is a Sage cornerstone for customer experience. If you're not familiar with Sage Advisor, how it works, how it impacts your clients, and how it may benefit your practice, come join us for a presentation of what it does today and a discussion of what you'd like to see it do in the future.

P-141 **Sage 50—U.S. Edition Automated Deployment (Simplifying Install, Upgrade, and Update) | Presenter: Debbie Krebs**

As technology changes, so should our distribution model. Attendees will learn about the changes ahead for how we deliver and activate Sage products and updates. Imagine an activation process that didn't involve digging through emails, remembering ID codes, and pulling out your hair!

Session Descriptions

C-172 Designing Financial Statements in Sage 50 Accounting—U.S. Edition | Presenter: Rick Pope
Designing a financial statement is one of the more advanced procedures in Sage 50 and can be a complex task for those who do not first acquaint themselves with the design tools available.

P-133 Sage 50—U.S. Edition Payments Roadmap in the Small Business Landscape | Presenter: Jim Collins
It's all about efficiency and cashflow in the small business landscape. Attendees will learn about the Sage 50 offerings related to paying vendors, remittances, and employees; receiving payments; and how integrated solutions can help businesses move money with greater speed and accuracy and fewer hassles.

C-174 Sage 50 U.S.—Edition Intelligence Reporting Financial Workshop | Presenter: David Polk
Do not miss this session on important tips and instruction on using Sage 50 Intelligence Reporting! Topics in this session will cover Financial Report Designer enhancements, custom mapping, and custom row reporting, working with report trees and account filtering, and creating distribution instructions and automated scheduling.

C-175 Microsoft Office Integration with Sage 50 Accounting—U.S. Edition | Presenter: Rick Pope
Sage 50 includes many features that integrate with Microsoft Office, offering you enhanced ways to use Sage 50 with the Microsoft products that you use every day.

C-177 Customizing Sage 50 Accounting—U.S. Edition | Presenter: Rick Pope
There are many popular (and not so well known) settings and features in Sage 50 that help you tailor your Sage 50 experience for maximum productivity.

C-178: Maintaining Your Sage 50 Accounting—U.S. Edition Company Data | Presenter: Rick Pope
Making regular backups and maintaining an error-free database are essential steps in keeping your company information dependable and in top-top shape.

C-168 Sage 50 Accounting—U.S. Edition: Tips and Tricks From a Pro | Presenter: Harry Choe
Calling all experienced users! Are you looking to enhance your Sage 50 Accounting product efficiency? These sessions are specifically designed for advanced users.

Session Descriptions

C-9 The Power of Video in Marketing, Sales, and Customer Service | Presenter: Tommy Williams

Come learn about the power of video. It is a valuable tool in marketing, sales, customer service, and even reporting software issues. This session will include a discussion about lessons learned, dos and don'ts, screen recording/video editing apps, video sharing sites, knowing your target audience, and how to get past the fear of being in front of the camera.

C-181 Sage 50 Accounting—U.S. Edition Time Ticket Essentials | Presenter: Rick Pope

Sage 50 provides time and expense ticket features that help you track and bill for the time your vendors and employees spend when working with your customers.

C-182 What's New in Sage 50—U.S. Edition Intelligence Reporting 2014 | Presenter: David Polk

It's time to refresh your report writing skills and learn what's new in Sage 50—U.S. Edition Intelligence Reporting. Features covered in this session include custom mapping and row reporting, right-click drill down, current month layout, and distribution. If you're already using this report writing tool or if you'd like to see it for the first time, this session is all about the latest and greatest!