

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 Greet				
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-112: Sage 50—Canadian Edition Product Vision and Discussion	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-105: Office 2013: What's in It for Me	P-146: Release the Shackles of Bad Presentations
3:15 p.m.–4:15 p.m.	P-113: Canadian Edition Payments Roadmap in the Small Business Landscape	P-6: Twitter 201—I'm on Twitter . . . Now It's Time to Unlock the Power! BYOD	P-106: Increasing Revenue and Client	P-126: Sage One Overview: How It Fits in Your Portfolio	P-106: Increasing Revenue and Client Engagement in Your Firm
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-114: Introduction to Sage Intelligence	P-127: Sage Advisor for Sage 50 Accounting—Canadian Edition
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-115: Sage 50 Accounting—Canadian Edition Tips and Tricks	P-103: Winning in Competitive Situations—Construction Accounting Panel	P-196: Life Balance	P-108: Tech Update 2013	P-196: Life Balance
9:45 a.m.–11:00 a.m.	P-128: Sage 50—Canadian Edition Automated Deployment (Simplifying Install, Upgrade, and Update)	P-110: Excel's PowerPivot and Power View: A Dynamic Duo!	P-128: Sage 50—Canadian Edition Automated Deployment (Simplifying Install, Upgrade, and Update)	P-117: Mobile and Cloud Solutions	P109: Top Ten Business Myths
11:15 a.m.–12:30 p.m.	P-129: Prioritization of New Features in Sage 50 Accounting—Canadian Edition	P124: Sage 50—Canadian Edition Intelligence Reporting: Financial Workshop	P-111: Excel Guru's Toolbox	P-5: Twitter 101—What's Twitter? Getting Started and the Basics of Twitter—BYOD	P-111: Excel Guru's Toolbox
12:30 p.m.–2:00 p.m.	Expo and Lunch				
2:00 p.m.–3:00 p.m.	P-130: Program Roundtable—Sage 50 Accounting—Canadian Edition SAN Members	P-130: Program Roundtable—Sage 50 Accounting—Canadian Edition SAN Members	P-130: Program Roundtable—Sage 50 Accounting—Canadian Edition SAN Members	P-130: Program Roundtable—Sage 50 Accounting—Canadian Edition SAN Members	P-130: Program Roundtable—Sage 50 Accounting—Canadian Edition SAN Members
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.	C-164: Bank and Account Reconciliation in Sage 50 Accounting—Canadian Edition	C-27: Public Relations: It's up to You!	C-184: Making Your Business Antifragile	C-184: Making Your Business Antifragile	C-164: Bank and Account Reconciliation in Sage 50 Accounting—Canadian Edition
10:00 a.m.– 10:30 a.m.	Coffee				
10:30 a.m.–12:00 p.m.	C-165: Sage 50 Accounting—Canadian Edition Payroll Basics	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-185: Creating Strategy in a Small Business
12:00 p.m.–2:00 p.m.	Expo and Lunch				
2:00 p.m.–3:15 p.m.	C-176: Sage 50 Accounting—Canadian Edition: Reporting and Year End	C-59: Intro to Online Usability Testing	C-59: Intro to Online Usability Testing	C-62: Effective Ways to Benchmarking Your Website KPIs	C-176: Sage 50 Accounting—Canadian Edition: Reporting and Year End
3:15 p.m.–3:45 p.m.	Expo and Refreshment Break				
3:45 p.m.–4:45 p.m.	C-166: Database Maintenance and Best Practices for Data Protection With Sage 50 Accounting—Canadian Edition	C-185: Creating Strategy in a Small Business	C-185: Creating Strategy in a Small Business	C-185: Creating Strategy in a Small Business	C-166: Database Maintenance and Best Practices for Data Protection With 50 Sage Accounting—Canadian 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-167: Introduction to Sage Intelligence	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-167: Introduction to Sage Intelligence
3:15 p.m.–4:15 p.m.	C-168: Sage 50 Accounting—Canadian Edition: Tips and Tricks From a Pro	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—Canadian Edition: Tips and Tricks From a Pro
4:30 p.m.–5:30 p.m.	C-169: Sage 50 Accounting—Canadian Edition: Using the Form Designer	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-170: Sage 50—Canadian Edition Intelligence Reporting: Financial Workshop	C-125: Sage CRM: The Five Biggest Business Challenges and How Sage CRM Can Solve Them	C-170: Sage 50—Canadian Edition Intelligence Reporting: Financial Workshop	C125: Sage CRM: The Five Biggest Business Challenges and How Sage CRM Can Solve Them	C-170: Sage 50—Canadian Edition Intelligence Reporting: Financial Workshop
10:00 a.m.–10:30 a.m.	Coffee Break				
10:30 a.m.–12:00 p.m.	C-171: Sage 50 Accounting—Canadian Edition: Using Inventory	C-171: Sage 50 Accounting—Canadian Edition: Using Inventory	C-171: Sage 50 Accounting—Canadian Edition: Using Inventory	C-171: Sage 50 Accounting—Canadian Edition: Using Inventory	C-171: Sage 50 Accounting—Canadian Edition: Using Inventory
	Conference Concludes				

Session Descriptions



The Newbie

P-112 Sage 50—Canadian Edition Product Vision and Discussion | Presenter: Scott Munro

The roadmap starts with a specific look at Sage 50 Accounting 2014 (formerly Simply Accounting) and beyond to the future direction of this product line.

P-113 Sage 50—Canadian Edition Payments Roadmap in the Small Business Landscape | Presenter: Paul Ellis

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-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-115 Sage 50 Accounting—Canadian Edition Tips and Tricks | Presenter: Harry Choe

Are you using Sage 50 Accounting—Canadian Edition (formerly Simply Accounting) 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!

P-128 Sage 50—Canadian Edition Automated Deployment (Simplifying Install, Upgrade, and Update) | Presenter: Jim Collins

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-129 Prioritization of New Features in Sage 50 Accounting—Canadian Edition | Presenter: Matt Russell

This session is a new twist of the Product Roundtable. Attendees will see a demo of the IdeaScale tool, 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, but they will also review some ideas in the tool as it relates to their own businesses.

Session Descriptions



- P-130 Program Roundtable—Sage 50 Accounting—Canadian Edition SAN Members | Presenter: Jennifer Warawa and PAC**
In a new twist, the Sage 50—Canadian Edition SAN Roundtable will be facilitated by Jennifer Warawa and the Sage Accountants Network team and moderated by the Partner Advisory Committee (PAC). In this rotating roundtable session, work with members of your PAC committee, collecting feedback and suggestions on a variety of topics including membership benefits, communications, and more.
- C-164 Bank and Account Reconciliation in Sage 50 Accounting—Canadian Edition | Presenter: Harry Choe**
Is account reconciliation giving you a headache? From deposit slips to bank statements, learn the ins and outs of the Banking module in this session.
- C-165 Sage 50 Accounting—Canadian Edition Payroll Basics | Presenter: Alana Fryer**
Payroll deductions, and employee-related admin can be mind-boggling. In fact, it is the leading cause of ulcers in Canada (okay, so that's not exactly true . . . but payroll can cause business owners a lot of unnecessary stress). If this sounds like it could be you, take this session and learn payroll basics to get you started managing your payroll with Sage 50 Accounting—Canadian Edition.
- C-176 Sage 50 Accounting—Canadian Edition: Reporting and Year End | Presenter: Alana Fryer**
Get a head start on your fiscal year end with this expense-saving session. Understand the year-end checklist, year-end reports, and what your accountant will be looking for—before he asks for it. Being one step ahead of your accountant saves him time, which saves you money!
- C-166 Database Maintenance and Best Practices for Data Protection With Sage 50 Accounting | Presenter: Alana Fryer**
When your computer crashes, will you have a backup of your Sage 50 data? Attend this session and learn how to safeguard your database. In the event of flood, fire, or theft, this is your insurance policy. You will always have a copy of your data standing by.
- C-167: Introduction to Sage Intelligence | Presenter: David Polk**
If you are new to Sage 50 Intelligence Reporting, have never seen Sage Intelligence for Sage 50—Canadian Edition, or are interested in a refresher, this session is for you! Come and see an overview of the product, including the Report Manager and Connector module. This demo will impress everyone!
- C-168 Sage 50 Accounting—Canadian 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.
- C-169 Sage 50 Accounting—Canadian Edition: Using the Form Designer | Presenter: Alana Fryer**
Don't be embarrassed the next time you send out your invoices. This course will teach attendees how to add their logo, special comment, and address, as well as how to completely customize company forms using the Form Designer. This is a Sage 50 "best-kept secret"—don't miss it!

Session Descriptions



C-170 Sage 50—Canadian 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 include Financial Report Designer enhancements, custom mapping, custom row reporting, working with report trees, account filtering and creating distribution instructions, and automated scheduling. This session is a must-attend for report writing enthusiasts!

C-171 Sage 50 Accounting—Canadian Edition: Using Inventory | Presenter: Harry Choe

Whether you sell your time (services) or widgets, Sage 50 can keep track for you and provide valuable insight with specialized reports.

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-103 Winning in Competitive Situations—Construction Accounting Panel | Presenter: Todd Juhnke

Learn from this expert panel of Sage Construction and Real Estate Business Partners as they share real-life examples and commentary on how they're winning in competitive situations. Panelists will discuss trends they are seeing, messaging and positioning they rely on to differentiate our solutions, sales tactics, and pricing considerations. Walk away feeling more prepared and confident when encountering key competitors within the sales cycle and more likely to win.

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-124 Sage 50—Canadian 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 include Financial Report Designer enhancements, custom mapping, custom row reporting, working with report trees, account filtering and creating distribution instructions, and automated scheduling. This session is a must-attend for report writing enthusiasts!

P-130 Program Roundtable—Sage 50 Accounting—Canadian Edition SAN Members | Presenter: Jennifer Warawa and PAC

In a new twist, the Sage 50—Canadian Edition SAN Roundtable will be facilitated by Jennifer Warawa and the Sage Accountants Network team and moderated by the Partner Advisory Committee (PAC). In this rotating roundtable session, work with members of your PAC committee, collecting feedback and suggestions on a variety of topics including membership benefits, communications, and more.

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-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-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.

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-171 Sage 50 Accounting—Canadian Edition: Using Inventory | Presenter: Harry Choe

Whether you sell your time (services) or widgets, Sage 50 can keep track for you and provide valuable insight with specialized reports.

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 | 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-128 Sage 50—Canadian Edition Automated Deployment (Simplifying Install, Upgrade, and Update) | Presenter: Jim Collins

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!

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-130 Program Roundtable—Sage 50 Accounting—Canadian Edition SAN Members | Presenter: Jennifer Warawa and PAC

In a new twist, the Sage 50—Canadian Edition SAN Roundtable will be facilitated by Jennifer Warawa and the Sage Accountants Network team and moderated by the Partner Advisory Committee (PAC). In this rotating roundtable session, work with members of your PAC committee, collecting feedback and suggestions on a variety of topics including membership benefits, communications, and more.

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-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-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-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-170 Sage 50—Canadian 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 include Financial Report Designer enhancements, custom mapping, custom row reporting, working with report trees, account filtering and creating distribution instructions, and automated scheduling. This session is a must-attend for report writing enthusiasts!

C-171 Sage 50 Accounting—Canadian Edition: Using Inventory | Presenter: Harry Choe

Whether you sell your time (services) or widgets, Sage 50 can keep track for you and provide valuable insight with specialized reports.

The Innovator

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-126 Sage One Overview: How It Fits in Your Portfolio | 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. Attendees will 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.

This session is specifically focusing on the Sage One Canadian Edition and will be showing Canadian-specific features and functionality.

Session Descriptions



P-114 Introduction to Sage Intelligence | Presenter: David Polk

If you are new to Sage 50 Intelligence Reporting, have never seen Sage Intelligence for Sage 50—Canadian Edition, or are interested in a refresher, this session is for you! Come and see an overview of the product, including the Report Manager and Connector module. This demo will impress everyone!

P-108 Tech Update 2013 | Presenter: Randy Johnston

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-117 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!

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-130 Program Roundtable—Sage 50 Accounting—Canadian Edition SAN Members | Presenter: Jennifer Warawa and PAC

In a new twist, the Sage 50—Canadian Edition SAN Roundtable will be facilitated by Jennifer Warawa and the Sage Accountants Network team and moderated by the Partner Advisory Committee (PAC). In this rotating roundtable session, work with members of your PAC committee, collecting feedback and suggestions on a variety of topics including membership benefits, communications, and more.

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?

Session Descriptions



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-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-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.

Session Descriptions



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-171 Sage 50 Accounting—Canadian Edition: Using Inventory | Presenter: Harry Choe

Whether you sell your time (services) or widgets, Sage 50 can keep track for you and provide valuable insight with specialized reports.

The Teacher

P-146 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-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-127 Sage Advisor for Sage 50 Accounting—Canadian Edition | 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.

Session Descriptions



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.

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

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

P-130 Program Roundtable—Sage 50 Accounting—Canadian Edition SAN Members | Presenter: Jennifer Warawa and PAC

In a new twist, the Sage 50—Canadian Edition SAN Roundtable will be facilitated by Jennifer Warawa and the Sage Accountants Network team and moderated by the Partner Advisory Committee (PAC). In this rotating roundtable session, work with members of your PAC committee, collecting feedback and suggestions on a variety of topics including membership benefits, communications, and more.

C-164 Bank and Account Reconciliation in Sage 50 Accounting—Canadian Edition | Presenter: Harry Choe

Is account reconciliation giving you a headache? From deposit slips to bank statements, learn the ins and outs of the Banking module in this session.

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.

Session Descriptions



- C-176 Sage 50 Accounting—Canadian Edition: Reporting and Year End | Presenter: Alana Fryer**
Get a head start on your fiscal year end with this expense-saving session. Understand the year-end checklist, year-end reports, and what your accountant will be looking for—before he asks for it. Being one step ahead of your accountant saves him time, which saves you money!
- C-166 Database Maintenance and Best Practices for Data Protection With Sage 50 Accounting | Presenter: Alana Fryer**
When your computer crashes, will you have a backup of your Sage 50 data? Attend this session and learn how to safeguard your database. In the event of flood, fire, or theft, this is your insurance policy. You will always have a copy of your data standing by.
- C-167: Introduction to Sage Intelligence | Presenter: David Polk**
If you are new to Sage 50 Intelligence Reporting, have never seen Sage Intelligence for Sage 50—Canadian Edition, or are interested in a refresher, this session is for you! Come and see an overview of the product, including the Report Manager and Connector module. This demo will impress everyone!
- C-168 Sage 50 Accounting—Canadian 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.
- 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-170 Sage 50—Canadian 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 include Financial Report Designer enhancements, custom mapping, custom row reporting, working with report trees, account filtering and creating distribution instructions, and automated scheduling. This session is a must-attend for report writing enthusiasts!
- C-171 Sage 50 Accounting—Canadian Edition: Using Inventory | Presenter: Harry Choe**
Whether you sell your time (services) or widgets, Sage 50 can keep track for you and provide valuable insight with specialized reports.