



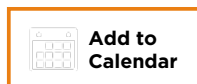
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Advance Configurations

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12
 ROOM: Bayhill 25
 ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Setting up configurations can be intimidating, but learning how to use them to their full potential will help you unlock a wealth of information crucial to your business. These records store important details about your customers and can be easily updated through the API's. In this session you will learn how to utilize the Configuration API to your advantage. We'll specifically review importing website requests, how handle password reset questions and automatically create tickets.

- This session is geared towards experienced configuration users, if you're newer to Configurations check out our other Configuration session: 'The Missing Piece of the Puzzle: Configurations'

LEVEL: 301

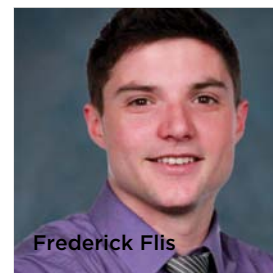
POWERED BY: ConnectWise

ROLE: Service Delivery, Operations

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 6 10:00 -11:00 AM
 (/SESSIONS/301-CONFIGURATIONS-USE-THE-
 CONFIGURATION-API/SESSIONDETAIL-6)

PRESENTED BY:



Frederick Flis

Business Consultant,
 ConnectWise

(/speakers
 /frederick-flis)



(https://www.chartec.net)

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Ready, Set, **GO!**

Five of the Coolest Things You Can Do With the Customer Portal

EDUCATION

WHEN & WHERE



Add to
Calendar

DAY 2 Thursday, November 12

ROOM: Florida A

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Staying connected with your customers is crucial to maintaining a good business relationship. Providing your customers a one-stop shop to view all their information can be achieved with the customer portal. This insightful session will countdown the top five things you can do with the portal to streamline your processes and impress your clients. Learn how to easily triage tickets, make your portal more accessible through your website, and upsell to your customers with customization. Build the portal to not only work for your customers, but also for you!

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Service Delivery

PRESENTED BY:



Mitchell Rollo

Education Consultant,
ConnectWise

(/speakers/mitchell-rollo)



WEBROOT
Channel Edge
FOR MSPs

WEBROOT
Smarter Cybersecurity

Learn more

Harness the Power of Collective Threat Intelligence

See how our Global Site Manager and MSP Partner Program empower MSPs, lower costs, and boost profitability!

(<http://webroot.com/partners>)

6 Ways to Make Money on Backup

Sponsored By: Veeam

VENDOR

WHEN & WHERE



Add to
Calendar

DAY 2 Thursday, November 12

ROOM: Orlando N

ROUND 2 11:15 -12:15 PM

SESSION DETAILS

You likely provide backup to most, if not all, of your clients. But are you taking full advantage of one of the most pervasive – and business critical – services you offer? Come to this session for new ideas on how to position and deliver backup services. You'll see backup in a whole new light – one that can secure and elevate your status with both new and existing clients.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



IT JUST WORKS!™

(/sponsors/veeam)

PRESENTED BY:



Vice President, Product Strategy, and Chief Evangelist, Veeam

(/speakers/doug-hazelman)

PRESENTED BY:



Vice President of Global Cloud Group, Veeam

(/speakers/mike-waguespack)



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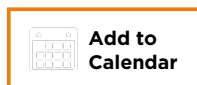
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7 Reasons Why Now Is the Time To Be In Managed Print Services

Sponsored By: Xerox

VENDOR

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Celebration 5

ROUND 7 11:15 -12:15 PM

SESSION DETAILS

Come see what Managed Print Services (MPS) can do for your business and how easy it is to capture new streams of monthly recurring revenue. Gain insight into why your customers care about MPS, and learn what market dynamics are driving this growing market opportunity. Quickly size how much revenue and profit is available to you within your existing customer base, and why your customers need you to provide them with a managed print solution.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/xerox)

PRESENTED BY:



Chris Iburg
Director, Managed Print Services Xerox Corporation
U.S. Channels Group, Xerox

(/speakers/chris-iburg)



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Agreements Lab

HANDS-ON LAB

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Celebration 3
ROUND 8 - ROUND 9 2:45 - 5:00 PM

SESSION DETAILS

Do you know what Agreements are, but not how to apply them? Are you intimidated or overwhelmed by the Thoughtt of Agreements? Join this session to arm yourself with the hands-on experience to successfully implement Agreements into your business. You will learn how to automate your billing process, track the hours your clients are using against their contracts, and gain insight into customer profitability. This hands-on lab will also walk you through the basics of creating global Agreement Types, setting up exclusions, generating Agreement invoices, and more.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Finance

PRESENTED BY:

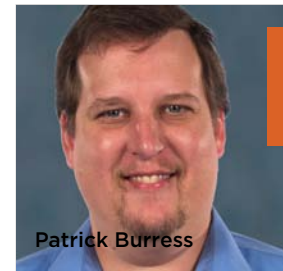


Patrick Shields

Partner Support Consultant,
ConnectWise

(/speakers/patrick-shields)

PRESENTED BY:



Patrick Burress

Business Consultant,
ConnectWise

(/speakers/patrick-burress)



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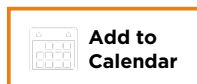
(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

Agreements Lab

HANDS-ON LAB

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Celebration 1
ROUND 3 - ROUND 4 1:45 - 4:00 PM

SESSION DETAILS

Do you know what Agreements are, but not how to apply them? Are you intimidated or overwhelmed by the Thoughtt of Agreements? Join this session to arm yourself with the hands-on experience to successfully implement Agreements into your business. You will learn how to automate your billing process, track the hours your clients are using against their contracts, and gain insight into customer profitability. This hands-on lab will also walk you through the basics of creating global Agreement Types, setting up exclusions, generating Agreement invoices, and more.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Finance

PRESENTED BY:

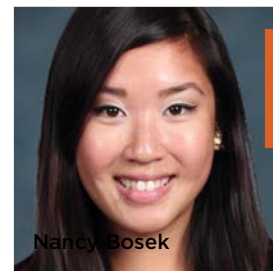


Patrick Shields

Partner Support Consultant,
ConnectWise

(/speakers/patrick-shields)

PRESENTED BY:



Nancy Bosek

Education Consultant,
ConnectWise

(/speakers/nancy-bosek)

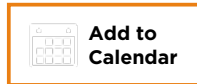


(<http://www.efolder.net>)

API Isn't a Dirty Word

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Bayhill 25
ROUND 10 5:30 -6:30 PM

SESSION DETAILS

You use ConnectWise to manage your business, workflow rules to ensure success and tracks to deliver consistent customer touches but if you aren't using the APIs you are missing a huge opportunity drive your automation to the next level. Attend this session and we will show you how easy it is to get started. You'll leave this session with the tools, code and guidance needed to take your automation to the next level.

LEVEL: 101

POWERED BY: ConnectWise Partner

ROLE: Operations

PRESENTED BY:



John Vernon

CTO, Web TekS

(/speakers/john-vernon)



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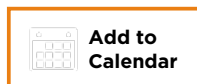
(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

Using ConnectWise and LabTech to Automate Billing

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Orlando N

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

Stay on top of your billing by using the seamless integration between ConnectWise and LabTech. Now you can automate the way managed services are billed, eliminating the gap between services and finance. LabTech will monitor the devices and users being managed, and pass that information directly to ConnectWise, all while automatically updating contracts with the new information. In this session learn how to: track and bill clients on Managed Services by user, bill with additions, and track costs to properly reflect gross revenue in reporting. Whether you are using LabTech or another RMM integration, this session will help to automate your billing help you save time and remove human error from invoicing.

LEVEL: 301

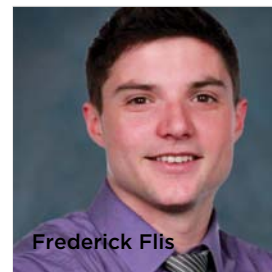
POWERED BY: ConnectWise

ROLE: Finance, Operations

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/AUTOMATE-BILLING-WITH-CONNECTWISE-AND-LABTECH/SESSIONDETAIL-10)

PRESENTED BY:



Frederick Flis

Business Consultant,
ConnectWise

(/speakers
/frederick-flis)



(<https://www.chartec.net>)

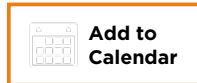
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Automating the ConnectWise Sales Cycle Through ChatAssist and CampaignDirector

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Celebration 9
ROUND 4 3:00 -4:00 PM

SESSION DETAILS

Do you want to increase sales without hiring additional sales representatives? If you have the right tools, and knowledge, this is possible. In this session you will learn how you can use ConnectWise® CampaignDirector™ and ChatAssist to automate the sales process. You will leave with the knowledge of how you can shorten the sales cycle and improve your sales team through reporting and automation.

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Sales, Operations, Marketing

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 6 10:00 -11:00 AM
(/SESSIONS/AUTOMATING-THE-CONNECTWISE-SALES-CYCLE-THROUGH-CHATASSIST-AND-CAMPAIGNDIRECTOR /SESSIONDETAIL-6)

PRESENTED BY:



Craig Fulton
General Manager of Dyno, ConnectWise Business Suite

(/speakers/craig-fulton)



Simplifying the as-a-Service Model

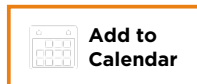
- ✓ Standardize
- ✓ No Risk
- ✓ Positive Cash Flow
- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

(<http://www.greatamerica.com/haar/>)

Automating the Procurement Lifecycle

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Orlando M

ROUND 8 2:45 -3:45 PM

SESSION DETAILS

From provisioning to shipping, the Procurement Lifecycle has many steps. The good news is that you have the power of automation to streamline your business, as with any process flow in ConnectWise. Join this session to learn how you can automate the lifecycle with features like auto closing fully received items, minimum stock on-hand demands, and workflow rules that alert you when items are received so you can start working! These pieces of automation are sure to bring your procurement flow to the next level!

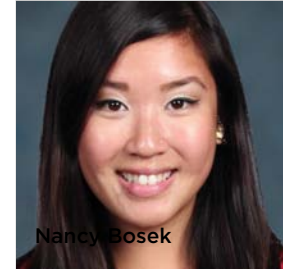
- If you are new to Procurement and interested in learning more, check out the Introduction to Procurement Lab!

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Owner/Executive, Operations

PRESENTED BY:



Nancy Bosek
Education Consultant,
ConnectWise

(/speakers/nancy-bosek)



Simplifying the *as-a-Service* Model

- | | |
|----------------------|-------------------------------|
| ✓ Standardize | ✓ Cloud-like Financial Model |
| ✓ No Risk | ✓ Boost MRR |
| ✓ Positive Cash Flow | ✓ Increase Business Valuation |

(<http://www.greatamerica.com/haar/>)

Avoiding Time Leak in your Organization

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Florida A
ROUND 6 10:00 -11:00 AM

SESSION DETAILS

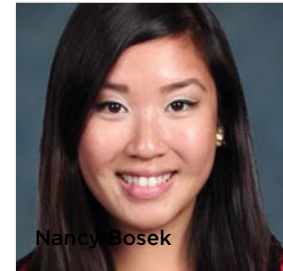
All time, all the time, on time - it's a ConnectWise best practice. Getting your colleagues to enter time is not always the easiest task but it is very important for a successful business. ConnectWise offers different features to help avoid time leak and this session will walk you through how to use them. You will learn how to effectively review timesheets, find hidden time and implement different features that will enforce accurate time entry. Attending this session will help to ensure that accurate time is tracked, leading to accurate billing. After all, time is money!

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Finance, Service Delivery

PRESENTED BY:



Nancy Bosek
Education Consultant,
ConnectWise

(/speakers/nancy-bosek)



Simplifying the *as-a-Service* Model

- ✓ Standardize
- ✓ No Risk
- ✓ Positive Cash Flow
- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

(<http://www.greatamerica.com/haar/>)



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Being a ConnectWise Admin Means Being a Business Analyst

PANEL

WHEN & WHERE



Add to
Calendar

DAY 3 Friday, November 13

ROOM: Bayhill 17

ROUND 10 5:30 -6:30 PM

SESSION DETAILS

Being a ConnectWise Admin is so much more than setting up users and building service boards. Join this panel session and hear from power admins and some of our own ConnectWise gurus to learn how to observe your business with a critical lens and guide executives not only to the answers they seek, but also to ask the right questions.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Operations



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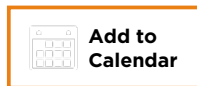
(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

Best Practices: Small but Mighty! The Sales Handoff from Sales to Support

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Florida B
ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Defining the sales handoff process is critical to keeping all business processes operating smoothly and efficiently. Designed for businesses with less than 25 people, this session will teach you how to leverage the tools in ConnectWise to pass won sales seamlessly to the appropriate teams in your organization. We'll review workflow rules, CRM surveys and standard templates - all serving to help document the necessary details, and make the transition as clean as possible.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Sales, Operations

PRESENTED BY:



Chris Romano
Senior Business Consultant,
ConnectWise

(/speakers/chris-romano)



"The ConnectWise® Business Suite™
streamlines business processes
—everything from sales to billing and ticketing—
to help us grow the business."

Mayron Herrera, President
Synetek Solutions

EXPLORE THE SUITE

(<http://www.connectwise.com/solutions/connectwise-business-suite>)



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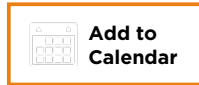
(<http://www.facebook.com>

Better Together: Sophos Cloud Adds Reflexion Email Security and Archiving Services

Sponsored By: Sophos

VENDOR

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Bayhill 19
ROUND 7 11:15 -12:15 PM

SESSION DETAILS

In June, Sophos expanded its world-class security suite by adding Reflexion's email compliance services. Join this session to learn about future enhancements and Reflexion's integration into Sophos Cloud. You'll also learn about the Sophos product line and how it all works together — from UTMs to endpoints, disk encryption to secure Wi-Fi, and from Sophos Mobile Control to the all-new Cloud Web Gateway offering.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:

SOPHOS

(/sponsors/sophos)

PRESENTED BY:



Scott Barlow
Vice President of Reflexion Sales, Sophos

(/speakers/scott-barlow)



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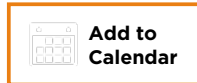
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The Jedi Council - How Your Peers Think Like A Rebel And Blow Up The Competition

Sponsored By: Axcient

VENDOR

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 21

ROUND 2 11:15 -12:15 PM

SESSION DETAILS

Join the Jedi Council and Mark Petosky, Director Channel Sales, and learn how to win more deals and move to the mid-market. This interactive Q&A panel with your peers will cover best practices surrounding:

- Pricing and margins in mid-market deals
- Marketing spend, programs, and events that get you noticed
- Managing unmanaged clients
- Getting more done with less

LEVEL: 101, 201, 301

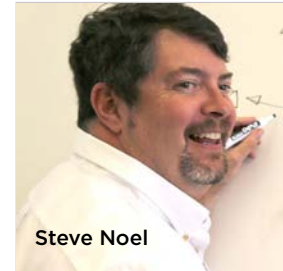
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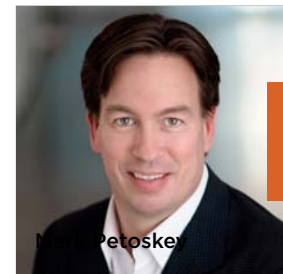
PRESENTED BY:



Steve Noel

Channel Evangelist, Axcient

(/speakers/steve-noel)
PRESENTED BY:



Mark Petosky

Director of Channel Sales,
Axcient

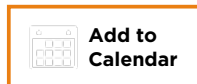
(/speakers/mark-
petoskey)



Brandable and Recognizable: HTML

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Celebration 12

ROUND 8 2:45 -3:45 PM

SESSION DETAILS

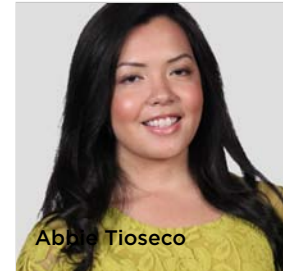
The momentum of mobile internet growth has been aggressive and exponential. The majority of your clients are viewing your website, marketing emails, ticket notifications and invoices on their mobile devices. Is your website mobile friendly? Do your emails bring brand awareness to your company? Are you designing your site and emails with "mobile first" in mind? Even if you don't have a marketing guru, technical writer or instructional designer on staff to help you develop your site or emails you can still have a mobile friendly presence. In this session you'll learn how to make your website and emails mobile responsive, as well as tips on how you can leverage your client base via well branded communications.

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Marketing

PRESENTED BY:

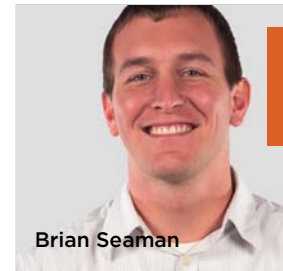


Abbie Tioseco

Senior Technical
Communicator, ConnectWise

(/speakers/abbie-tioseco)

PRESENTED BY:



Brian Seaman

Instructional Designer,
ConnectWise

(/speakers/brian-seaman)



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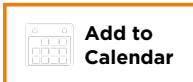
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Building a Culture of Accountability

PANEL

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Bayhill 17
ROUND 6 10:00 -11:00 AM

SESSION DETAILS

Creating a workplace environment where people feel safe truly harnesses a culture of accountability from your team. Looking for some insights to ensure this is the type of environment your people are walking into everyday? Then join this panel of partners who have been able to create a culture at their company where folks are happy to come to work, where they help and trust each other and learn how they did it. Plus see what impact it has on sales, profits and client retention.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive, Human Resources



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Building Sales Teams

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Bayhill 25

ROUND 6 10:00 -11:00 AM

SESSION DETAILS

Successful businesses rely heavily on successful sales teams. Building and managing a successful sales team can be a difficult puzzle to solve. Join Chief Revenue Officer of ConnectWise, Adam Slutskin, as he walks you through how to hire and manage a sales team. He'll also share incentive tactics and compensation plans proven to keep your team motivated. Once all the pieces are in place, learn how to report and review this information within your ConnectWise system to give you a complete understanding of how your sales team is performing and how to make them better!

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Sales, Owner/Executive

PRESENTED BY:



Adam Slutskin
Executive Vice President & Chief Revenue Officer, ConnectWise

(/speakers/adam-slutskin)



Simplifying the *as-a-Service* Model

- ✓ Standardize
- ✓ No Risk
- ✓ Positive Cash Flow
- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

(<http://www.greatamerica.com/haar/>)



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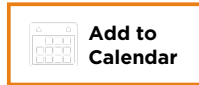
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Bursty or Thirsty - AWS, Azure and/or Private Cloud "What's a service provider to do?"

Sponsored By: LogicMonitor

VENDOR

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Orlando L
ROUND 7 11:15 -12:15 PM

SESSION DETAILS

Public, Private, Hybrid. Build or Buy, oh my! Is going to market today easier or more challenging? People say the Cloud is going to make things "easier," but for who? In a world of choice comes risk and complexity, so what are the best practices for now and in the future?

Learn from a panel of accomplished Service Providers that have all created a successful cloud strategy. Leave with real world knowledge that can be implemented today.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:

LogicMonitor

(/sponsors/logicmonitor)

PRESENTED BY:



Service Provider & Channel Development, LogicMonitor

(/speakers/andrew-morgan)

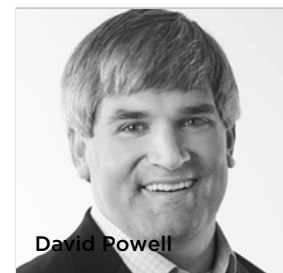
PRESENTED BY:



CEO, LogicMonitor

(/speakers/kevin-mcgibben)

PRESENTED BY:



VP of Managed & Cloud Services - Marketing, TekLinks

(/speakers/david-powell)

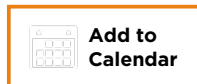
PRESENTED BY:



Complicated Invoices Made Simple

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 31

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Understanding your invoices can be convoluted with different service offerings, billing rates, and customer preferences. By utilizing key aspects of ConnectWise such as Invoice Templates, Invoice Email Formats, Invoice Routing, and Invoice Delivery Methods, you can rest easy knowing the right information is on the right invoice. You will learn everything you need to know about billing rate setup, invoice approvals, invoice customizations, and so much more!

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Finance

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 9 4:00 -5:00 PM
(/SESSIONS/COMPLICATED-INVOICES-MADE-SIMPLE
/SESSIONDETAIL-9)

PRESENTED BY:



Michelle Ibrahim

Senior Business Consultant,
ConnectWise

(/speakers/michelle-
ibrahim)



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SPONSORS (/SPONSORS)

Complicated Tax Scenarios Revealed

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 12

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

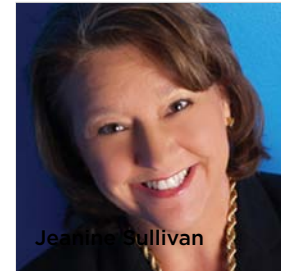
Does 301 tax setup keep you up at night? Join this session to ease your mind, and learn how implement or improve your 301 tax scenarios. Throughout this session, you will discover the possibilities that are available to you through integrations that will save you time, struggles, and IRS interaction. In order to get the most out of this session, bring your A-game and some prior knowledge of your accounting package setup.

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Finance

PRESENTED BY:



Jeanine Sullivan

Senior Business Consultant,
ConnectWise

(/speakers/jeanine-sullivan)



"The ConnectWise® Business Suite™
streamlines business processes
—everything from sales to billing and ticketing—
to help us grow the business."

Mayron Herrera, President
Synetek Solutions

EXPLORE THE SUITE

(<http://www.connectwise.com/solutions/connectwise-business-suite>)



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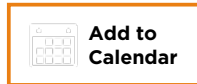


(<http://www.youtube.com>

ConnectWise Agreements Lab

HANDS-ON LAB

WHEN & WHERE



DAY 1 Wednesday, November 11
ROOM: Bayhill 32
LAB ROUND B 2:30 -4:30 PM

SESSION DETAILS

Do you know what Agreements are, but not how to apply them? Are you intimidated or overwhelmed by the Thought of Agreements? Join this session to arm yourself with the hands-on experience to successfully implement Agreements into your business. You will learn how to automate your billing process, track the hours your clients are using against their contracts, and gain insight into customer profitability. This hands-on lab will also walk you through the basics of creating global Agreement Types, setting up exclusions, generating Agreement invoices, and more.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Finance

PRESENTED BY:



Patrick Burress

Business Consultant,
ConnectWise

(/speakers/patrick-burress)



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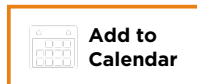
(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

ConnectWise APIs: Dream It, Build It

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 7

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

What if you could make a simple customization with your ConnectWise instance that would positively impact your company's productivity, efficiency and at the end of the day...your profitability? You probably have some LOB applications that aren't integrated to ConnectWise today. Or maybe you have workflows and processes that require a bit of a tweak to ConnectWise. Let's shift the paradigm away from enhancement requests and instead to understanding the power of the ConnectWise API to truly customize your ConnectWise experience. Join us for this super cool session where we will:

1. Introduce the ConnectWise API library
2. Navigate the powerful ConnectWise Developer Network
3. BUILD an integration real time to show you just how easy it is

We'll also reserve some time for interactive Q&A, so bring your use cases with you and we'll tell you if it can be done. This session is a do not miss for ConnectWise partners who understand the power of extensibility through APIs.

LEVEL: 201

POWERED BY: ConnectWise

ROLE: Operations, Owner/Executive, Service Delivery

PRESENTED BY:



Jeannine Edwards

Director of ConnectWise Platform, ConnectWise

(/speakers/jeanine-edwards)




Harness the Power of Collective Threat Intelligence

See how our Global Site Manager and MSP Partner Program empower MSPs, lower costs, and boost profitability!



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ConnectWise Business Suite - The End to End Lifecycle EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Bayhill 29
ROUND 4 - ROUND 5 3:00 - 5:30 PM

SESSION DETAILS

When you use the ConnectWise Business Suite to the fullest extent, it becomes the most powerful automation platform your company can own. With the LabTech integration, you can create automatic time entries for regularly repeated automation, providing value to your agreements in ConnectWise. With Quosal's integration, you're able to hold opportunities until the perfect time, calling clients to walk through their quotes minutes after they've reviewed it, making it much more likely to win the sale. Join this session to see these powerful integrations in action. If you're not a Suite partner, come see the possibilities! If you are, attend to see what your integration should be doing for you today. Leave with the knowledge you need to leverage the power of automation and take your business to the next level!

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Finance, Human Resources, Marketing, Operations, Sales, Service Delivery, Owner/Executive

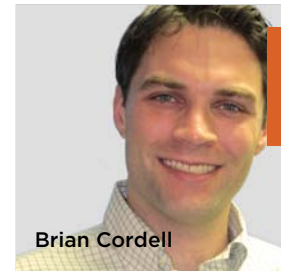
PRESENTED BY:



Product Manager,
ConnectWise

(/speakers/gary-
funaro)

PRESENTED BY:



Solution Strategist,
ConnectWise

(/speakers/brian-
codell)



"The ConnectWise® Business Suite™
streamlines business processes
—everything from sales to billing and ticketing—
to help us grow the business."

Mayron Herrera, President
Synetek Solutions

EXPLORE THE SUITE

(<http://www.connectwise.com/solutions/connectwise-business-suite>)

ConnectWise Implementation Part 1

HANDS-ON LAB

WHEN & WHERE



DAY 1 Wednesday, November 11

ROOM: Bayhill 26

LAB ROUND A 12:00 -2:00 PM

SESSION DETAILS

Embracing Change, it is a ConnectWise Best Practice and if you're new to ConnectWise, you're probably experienced a big change. Join this implementation session to get started on the path to success. This lab will give you comprehensive look at the foundation of your ConnectWise system. You will learn how to define the Company Structure, Time Periods, Billing Rates, and Services in this session.

- Make sure to attend Part 2 (/sessions/connectwise-implementation-part-2/sessiondetail-pm), which includes Agreements, Time, Invoicing, and the GL integration.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Owner/Executive, Operations

PRESENTED BY:



Steffanie Jameson

Business Consultant,
ConnectWise

(/speakers/steffanie-jameson)



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(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

ConnectWise Implementation Part 2

HANDS-ON LAB

WHEN & WHERE



DAY 1 Wednesday, November 11
ROOM: Bayhill 26
LAB ROUND B 2:30 -4:30 PM

SESSION DETAILS

Now that you've finished the Connect Implementation Part 1 (/sessions/connectwise-implementation-part-1/sessiondetail-am) session, you're ready to attend Part 2! You've learned everything you need to know about Company Structure, Time Periods, Billing Rates, and Services - now it's time to gear up for Agreements, Time, Invoicing, and GL Integration. When you finish this session, you'll leave having all the necessary information you need to get started with the ConnectWise system.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Owner/Executive, Operations

PRESENTED BY:



Steffanie Jameson
Business Consultant,
ConnectWise

(/speakers/steffanie-jameson)



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([http://www.youtube.com](http://www.youtube.com/user/labtechsoftware?feature=watch)

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ConnectWise Invoicing and GL Lab

HANDS-ON LAB

WHEN & WHERE



Add to
Calendar

DAY 1 Wednesday, November 11

ROOM: Bayhill 23

LAB ROUND A 12:00 -2:00 PM

SESSION DETAILS

Creating timely, professional, and most importantly, accurate invoices will leave a lasting, positive impression on customers, and will help to build rapport. This hands-on lab will cover everything you need to know about invoicing in ConnectWise. You will learn how to master the invoicing process for standard and agreement invoices, create down payments and restrict them, and become proficient in mapping products to your GL Accounts. You will walk away with the hands-on experience you need to properly implement invoicing within ConnectWise for your business.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Finance

PRESENTED BY:

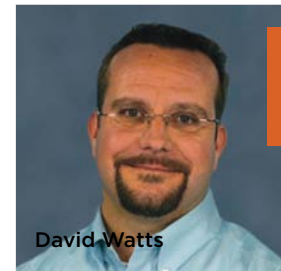


Max Cooper-Dowda

Premium Support Consultant,
ConnectWise

(/speakers
/max-cooper-dowda)

PRESENTED BY:



David Watts

Consulting Team Lead,
ConnectWise

(/speakers/david-
watts)



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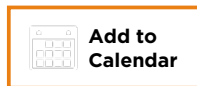
(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

ConnectWise Project Board - Secret to KILLER Proposals and MASSIVE Profitability

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Florida A
ROUND 9 4:00 -5:00 PM

SESSION DETAILS

Did you know that ConnectWise has an *amazing* Project Management feature built-in? Most MSPs don't! Did you know that the Project Board is a hidden treasure waiting to be tapped? Most people don't! In this interactive, engaging presentation, fellow MSP and Compliance Expert Raj Goel, CISSP will show you how Brainlink uses the Project Board to proactively sell high-revenue, high-profit projects. He will also show you a stress-free way to generate killer proposals that lead to increased client happiness, increased MSP staff happiness and increased profits!

LEVEL: 101, 201

POWERED BY: ConnectWise Partner

ROLE: Sales, Operations, Service Delivery

PRESENTED BY:



Raj Goel
CTO, Brainlink International, Inc.

(/speakers/raj-goel)



(https://www.chartec.net)

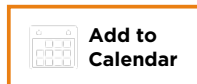
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and transforming your business.
Get Started with this E-Book.

Ready, Set, GO!

ConnectWise Report Writer Basics Lab

HANDS-ON LAB

WHEN & WHERE



DAY 1 Wednesday, November 11

ROOM: Bayhill 33

LAB ROUND B 2:30 -4:30 PM

SESSION DETAILS

Do you have a need for custom reporting, but aren't sure where to start with Report Writer? This hands-on session will introduce you to database concepts, reporting views, and you'll even create a report of your own. Be sure to bring your existing ConnectWise knowledge with you. This includes an understanding of how different areas relate to one another like a service board to a service team, or time entries to tickets.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Service Delivery

PRESENTED BY:



Joseph Schreck

Business Intelligence
Consultant, ConnectWise

(/speakers/joseph-schreck)

PRESENTED BY:



Neil Perkins

Business Consultant,
ConnectWise

(/speakers/neil-perkins)



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(<http://www.youtube.com>

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ConnectWise Sales Flow Lab

HANDS-ON LAB

WHEN & WHERE



Add to
Calendar

DAY 1 Wednesday, November 11

ROOM: Bayhill 28

LAB ROUND B 2:30 -4:30 PM

SESSION DETAILS

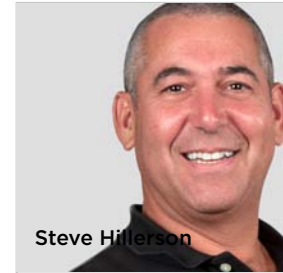
The entire ConnectWise Lifecycle hinges on a well-built sales flow within the system. Effectively using ConnectWise to manage the sales process will streamline everything from sales to invoicing. Throughout this hands on session, you will learn how to implement a sales flow within your organization. You will also work through several examples of opportunity best practices, automation, and the conversion from sales to service and procurement.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Sales

PRESENTED BY:



Steve Hillerson

Senior Business Consultant,
ConnectWise

(/speakers/steve-
hillerson)

PRESENTED BY:



Rebecca Simons

Senior Project Manager,
ConnectWise

(/speakers/rebecca-
simons)



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ConnectWise Virtual Admin Lab

HANDS-ON LAB

WHEN & WHERE



DAY 1 Wednesday, November 11
ROOM: Bayhill 28
LAB ROUND A 12:00 -2:00 PM

SESSION DETAILS

Do you know what a ConnectWise Administrator really does, or what their responsibilities include? A ConnectWise Administrator is essential for keeping your system up to date, and that you get the most out of it. This session will take you through everything an administrator should know, including software updates, new features, the University, and more! When you leave this session, you will be ready to take on the ConnectWise Administrator title, and how to take advantage of everything the ConnectWise system can do for your organization.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Operations

PRESENTED BY:



Michelle Ibrahim

Senior Business Consultant,
ConnectWise

(/speakers/michelle-ibrahim)



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ConnectWise Workflow Rules Lab

HANDS-ON LAB

WHEN & WHERE



DAY 1 Wednesday, November 11
ROOM: Bayhill 33
LAB ROUND A 12:00 -2:00 PM

SESSION DETAILS

Once you have the proper processes in place, you can leverage the power of Workflow Rules to automate your business and save time, money and reduce human error. YAY! Attend this hands-on lab to learn everything you need to know about automation in ConnectWise, including won opportunities, expiring configurations, survey scores, and more! Become a Workflow master, and take your automation to the next level!

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Service Delivery, Operations

PRESENTED BY:



Neil Perkins

Business Consultant,
ConnectWise

(/speakers/neil-perkins)



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Customer Service the Marriot Way

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Bayhill 21

ROUND 8 2:45 -3:45 PM

SESSION DETAILS

Are we in the technology business or the customer service business? While we may be experts at delivering technology solutions, it won't matter if we don't know how to treat our clients. In this session, we'll discuss some of the challenges IT business owners face on a daily basis, and then focus on of the biggest one; delivering exceptional customer service to our clients. We'll review the typical customer service issues of the hospitality industry, how they parallel those of the IT Service Provider, and how you can apply the world renowned customer service principles taught by Marriott International to over 120,000 employees worldwide. This will be an interactive discussion, so bring your questions, ideas, and be prepared to engage.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive, Service Delivery, Operations

PRESENTED BY:



Vince Tinnirello
CEO, Anchor Network Solutions

(/speakers/vince-tinnirello)



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Smarter Cybersecurity

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Harness the Power of Collective Threat Intelligence

See how our Global Site Manager and MSP Partner Program empower MSPs, lower costs, and boost profitability!

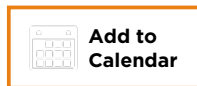
(<http://webroot.com/partners>)

Cyber-Security: Sell Products or Solve Problems?

Sponsored By: Vijilan Security

VENDOR

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Florida C

ROUND 7 11:15 -12:15 PM

SESSION DETAILS

Despite your best efforts, your customers are throwing their hands up in defeat because traditional security measures just aren't working. The process of Buy Best-of-Breed Product, Check Compliance Box, Get Hacked - causes frustration. In this session, Tom Fitzpatrick and Gary Mullen reveal what's really going on in today's cyber-threat landscape, and discuss solving your customer's security problems by morphing from "Trusted Advisor to Trusted Provider". There's a better way!

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/vijilan-security)

PRESENTED BY:



Tom Fitzpatrick

Vice President, Marketing,
Vijilan Security

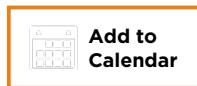
(/speakers
/tom-fitzpatrick)



DaaS the Cloud Question. Are You in Sync with Distribution Direction?

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Celebration 12
ROUND 6 10:00 -11:00 AM

SESSION DETAILS

“Distribution as a Service” is more than a label. It’s the new reality in technology distribution. Pick, pack and ship still matter, but how you partner with distributors can ultimately help make or break your business model in the digital era. Learn what solution providers are saying about distributors in the cloud, how vendors are turning to distributors with IoT transformation in mind. You’re on the front lines. Know where distributor services can make a difference today and down the road.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive

PRESENTED BY:



Tim Curran
CEO, Global Technology
Distribution Council

(/speakers/tim-curran)



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Decrease Outstanding Accounts Receivable, Increase Revenue

EDUCATION

WHEN & WHERE



Add to
Calendar

DAY 3 Friday, November 13

ROOM: Bayhill 31

ROUND 9 4:00 -5:00 PM

SESSION DETAILS

The collections process can take a large portion of your financial team's time, costing you time AND money. Don't leave money on the table due to unpaid invoices, increase the efficiency of your collections process and implement automation. This session will cover the entire collections process from the initial collections notification to deactivating time entries. These steps will save time and increase the amount collected from past due invoices.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Finance

PRESENTED BY:



Ophelia Clarke

Business Consultant,
ConnectWise

(/speakers/ophelia-clarke)



Simplifying the as-a-Service Model

- ✓ Standardize
- ✓ No Risk
- ✓ Positive Cash Flow
- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

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Delivering Projects on Time and Under Budget

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Orlando L

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Project management is key to getting a project completed correctly, on time, and within budget and ConnectWise is fully equipped with the tools necessary to manage projects within the system. This session will review 301 uses for projects, discuss reporting and necessary automatic notifications. Learn to use workflow rules and project reports to stay on track of your project and avoid scope creep. Leverage the automation power of ConnectWise with built-in accountability loops to edge this issue. Leave with an understanding how to implement a new project management plan within ConnectWise.

- New to projects? It's recommended that you attend the Project hands-on Lab as this session will not review setup.

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Operations, Service Delivery

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 9 4:00 -5:00 PM
(/SESSIONS/DELIVERING-PROJECTS-ON-TIME-AND-UNDER-BUDGET/SESSIONDETAIL-9)

PRESENTED BY:



Steffanie Jameson

Business Consultant,
ConnectWise

(/speakers/steffanie-jameson)



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(<http://webroot.com/partners>)

Developing a Solution Portfolio

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 25

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

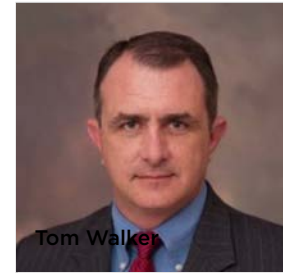
Defining "your" way has always been key to effective managed services delivery, but how do you decide what products fit into your offering and how will they be monetized? In this sessions we will offer practical guidance on product selection, buy versus build, and strategies for pricing and marketing your product.

LEVEL: 201

POWERED BY: ConnectWise Partner

ROLE: Service Delivery, Owner/Executive

PRESENTED BY:



Tom Walker

President, Web Teks, Inc.

(/speakers/tom-walker)



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—everything from sales to billing and ticketing—
to help us grow the business."

Mayron Herrera, President
Synetek Solutions

EXPLORE THE SUITE

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(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

Developing Your Product Catalog in ConnectWise

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Celebration 5
ROUND 9 4:00 -5:00 PM

SESSION DETAILS

Whether you're just starting out or looking to improve your set of offerings, product development is essential. Product development allows you to align customer preferences, delivered value, and execution of key activities across your business. Join this session to discuss the best practices for developing and tracking your product catalog within ConnectWise. Leave knowing how to configure your product catalog in ConnectWise in a way that makes tracking easy.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Service Delivery, Operations

PRESENTED BY:



Lee Pruitt
Business Consultant,
ConnectWise

(/speakers/lee-pruitt)



Simplifying the *as-a-Service* Model

- ✓ Standardize
- ✓ No Risk
- ✓ Positive Cash Flow
- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

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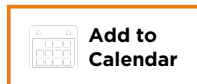
/ConnectWise)



Differentiating Your MSP Business

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Florida B

ROUND 9 4:00 -5:00 PM

SESSION DETAILS

From the outside, all Managed Service Providers could look the same. Even with the sharpest marketing programs, it's hard to tell the difference. However, there is one asset that can help you company stand out from the competition... your sales people. In this session, you will learn an overall philosophy of your sales people becoming your primary differentiator. We will also dig into many specific strategies and tactics that will offer ideas that your sales people can implement immediately.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Sales, Owner/Executive

PRESENTED BY:



Chris Peterson
Principle, Speaker and
Consultant, Vector Firm

(/speakers/chris-
peterson)



(http://www.efolder.net)



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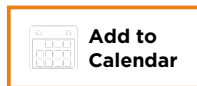
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/ConnectWise)

Discover Your Differentiators: How to Create an Undeniable Competitive Advantage

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Bayhill 21
ROUND 6 10:00 -11:00 AM

SESSION DETAILS

Small business owners that haven't taken the time to discover their differentiators and learn how to articulate them, often find themselves competing on price alone. And that's a slippery slope in a fierce marketplace where there is always, always, someone willing to work for less than you. In this session you'll discover how to identify your secret sauce so you're never left to compete on price again.

Key Takeaways:

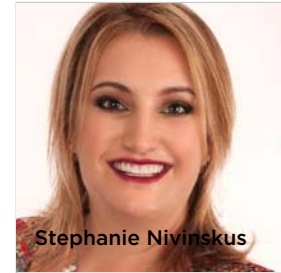
- How to conduct competitive research, ninja style
- How to identify the differentiators that matter in the marketplace
- How to transform your differentiators into benefits your clients will buy

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive, Marketing

PRESENTED BY:



Stephanie Nivinskus

President, SizzleForce Marketing

(/speakers/stephanie-nivinskus)



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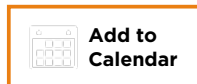
LEARN MORE

(<http://www.veeam.com/service-providers.html>)

Dispatching in Your Organization

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Orlando L

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

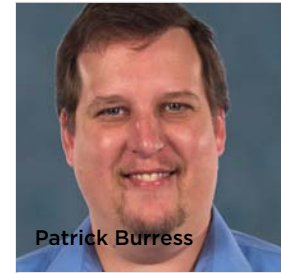
New to dispatching, or have a new project that must be allocated to your team members? No problem! Attend this session to learn dispatching best practices and how to put a process in place, whether you have an official dispatcher... or not! I You will learn how to save time, cut costs and ensure items are scheduled for the most efficient resource. Furthermore, we will discuss the proper steps to pre-process tickets and helpful tips to maximize efficiencies in the application. This session is recommended for partners that are new to or do not have a process in place for dispatching.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Service Delivery

PRESENTED BY:



Patrick Burress

Business Consultant,
ConnectWise

(/speakers/patrick-burress)



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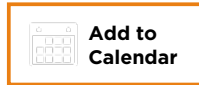
(<http://www.facebook.com>

eFolder and Replibit Roundtable: Three Partners Share Their Experiences

Sponsored By: eFolder

VENDOR

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Celebration 9
ROUND 2 11:15 -12:15 PM

SESSION DETAILS

Replibit is revolutionizing how MSPs deliver backup and disaster recovery. And when Replibit is vaulted with eFolder, the benefits are even more compelling. Come hear from three eFolder partners as they share how they are delivering a more reliable BDR offering to their clients, while driving higher levels of profitability with eFolder BDR for Replibit. All breakout attendees will receive a voucher for a 30 day free trial.

LEVEL: 101, 201, 301

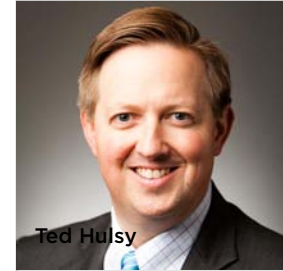
POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/efolder)

PRESENTED BY:



Ted Hulsy

VP Marketing, eFolder

(/speakers/ted-hulsy)

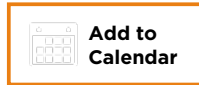


Expand your managed offerings with Dell Software Service Provider Program

Sponsored By: Dell

VENDOR

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Orlando M
ROUND 7 11:15 -12:15 PM

SESSION DETAILS

Learn how the Dell Software Service Provider Program can help you expand your managed offerings, diversify your services and position you as a trusted, capable partner to your customers. During this breakout we will detail how the Dell Firewall-as-a-Service and Data Protection-as-a-Service programs help partners to build innovative business solutions by:

- Lowering customer costs
- Increasing your competitive advantage and increase sales
- Utilizing the Dell Global Management System to lower your operational costs, prove your security effectiveness, and increase your client loyalty.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/dell)

PRESENTED BY:



Wilson Lee

Senior Product Line Manager,
Dell

(/speakers/wilson-lee)

PRESENTED BY:



Dan Sell

WW Service Provider Sales,
Dell

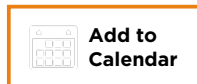
(/speakers/dan-sell)



Finance Workflow Rules You Must Implement

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 19

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

Are you successfully invoicing out of ConnectWise, but looking to take it to the next level? Workflow rules can take you there! Managing finances can be a lot of work, and items can easily fall through the cracks, but with workflow rules, you will save time and money. Join this session to learn about the workflow rules that will assist you in collections, invoice approvals, down payments, high-value purchase orders, and more!

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Finance

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 9 4:00 -5:00 PM
(/SESSIONS/FINANCE-WORKFLOW-RULES-YOU-MUST-IMPLEMENT/SESSIONDETAIL-9)

PRESENTED BY:



Kim Bailey

Business Consultant,
ConnectWise

(/speakers/kim-bailey)



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Finding and Winning New Business

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Orlando N

ROUND 6 10:00 -11:00 AM

SESSION DETAILS

Many managed service providers reach a point in their growth where they can't seem to find or win new business. Their sales team's time is occupied in taking care of current customers. However, there is an answer. In this session we'll discuss specific techniques to ensuring current account satisfaction while finding and winning new customers.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Sales

PRESENTED BY:



Chris Peterson

Principle, Speaker and
Consultant, Vector Firm

(/speakers/chris-
peterson)



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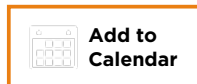
(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

Forecasting and Resource Reporting

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 5

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Keeping technicians booked and billable with a mix of service and project work is an important balancing act that owners and managers face. If this is something you struggle with, join Topher as he shows you how to use ConnectWise Reporting along with some automation to increase your ability to forecast resource needs. Leave with some solid tips for scheduling services alongside projects and ensuring projects are correctly scoped and planned. Ensure your work types are mapped to the proper utilization setting for accurate and useful reporting. Finding the right balance will ensure that you are making the most of your tech's time while keeping morale high and avoiding burnout.

LEVEL: 301

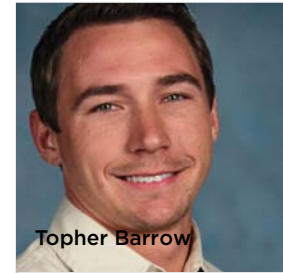
POWERED BY: ConnectWise

ROLE: Operations

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 9 4:00 -5:00 PM
(/SESSIONS/FORECASTING-AND-RESOURCE-REPORTING
/SESSIONDETAIL-8)

PRESENTED BY:



Topher Barrow

Senior Education Consultant,
ConnectWise

(/speakers/topher-
barrow)



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(<http://webroot.com/partners>)

From Sales to Invoicing: The Project Lifecycle

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 21

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

Ensuring a seamless handoff of a big project from sales to service can be a daunting task. When you don't fully utilize workflows, opportunity statuses and product classes, capturing all the details about a won project can be difficult. Even more difficult... ensuring these details are communicated with your project team! This session will walk you through setup and best practices you need to focus on when working opportunities for larger projects and the end result will be a finely tuned handoff from your sales to project team.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Sales, Operations, Service Delivery

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/FROM-SALES-TO-INVOCING-THE-PROJECT-LIFECYCLE/SESSIONDETAIL-10)

PRESENTED BY:



Steffanie Jameson

Business Consultant,
ConnectWise

(/speakers/steffanie-jameson)



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to help us grow the business."
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Synetek Solutions



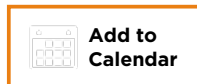
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(<http://www.connectwise.com/solutions/connectwise-business-suite>)

From Sales to Invoicing: The Project Lifecycle

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Bayhill 23
ROUND 10 5:30 -6:30 PM

SESSION DETAILS

Ensuring a seamless handoff of a big project from sales to service can be a daunting task. When you don't fully utilize workflows, opportunity statuses and product classes, capturing all the details about a won project can be difficult. Even more difficult... ensuring these details are communicated with your project team! This session will walk you through setup and best practices you need to focus on when working opportunities for larger projects and the end result will be a finely tuned handoff from your sales to project team.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Sales, Operations, Service Delivery

ALSO AVAILABLE:

DAY 2 Thursday, November 12 ROUND 4 3:00 -4:00 PM
(/SESSIONS/FROM-SALES-TO-INVOICING-THE-PROJECT-LIFECYCLE/SESSIONDETAIL)

PRESENTED BY:



Steffanie Jameson
Business Consultant,
ConnectWise

(/speakers/steffanie-jameson)



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Giving Your Marketing Wings - Top 10 Excuses for Not Marketing and How to Fix Them

EDUCATION

WHEN & WHERE



Add to
Calendar

DAY 2 Thursday, November 12

ROOM: Bayhill 23

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

So many business owners I talk to are relying on referrals. At first glance, it makes sense. Why market when hot leads are just throwing themselves at your feet. The problem with this logic is that the fountain won't always last. What are you going to do then? Most business owners turn in fear from the fact that now they will actually have to market. We'll help you get over that fear.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Marketing

PRESENTED BY:



Emalee Sugano

Marketing Director, ARRC
Technology and CharTec

(/speakers/emalee-sugano)



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Google Ad Words – The Good, The Bad, The Profitable EDUCATION

WHEN & WHERE



Add to
Calendar

DAY 2 Thursday, November 12

ROOM: Celebration 7

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

This session will teach you how to set up the inbound marketing strategy for Google Ad Words. You will learn the fundamentals of setting up a successful Google Campaign, the keywords/long-tail keywords, negative keywords, Ad Extensions and increasing your Quality Score through Google Ad Words so you rank higher and pay less.

LEVEL: 101

POWERED BY: ConnectWise Partner

ROLE: Marketing

PRESENTED BY:



Robb Rogers

President, Osprey Strategic
Research, LLC

(/speakers/robb-
rogers)



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Handling Change Requests Effectively

EDUCATION

WHEN & WHERE



Add to
Calendar

DAY 2 Thursday, November 12

ROOM: Celebration 9

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

ITIL experts have expressed the number one reason for unplanned outages in production environments is a lack of change control. Handling change requests effectively is a large part of ITIL standards. In order to lower the risk and costs associated with unplanned outages, it is essential to have a change management process in place. This session will show you how to use Service Tickets, Statuses, and ConnectWise Labs to establish your own process.

LEVEL: 301

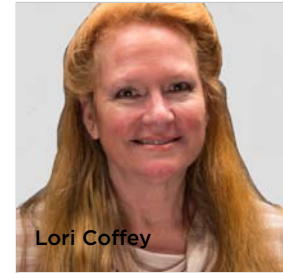
POWERED BY: ConnectWise

ROLE: Operations, Service Delivery

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 9 4:00 -5:00 PM
(/SESSIONS/HANDLING-CHANGE-REQUESTS-EFFECTIVELY
/SESSIONDETAIL-9)

PRESENTED BY:

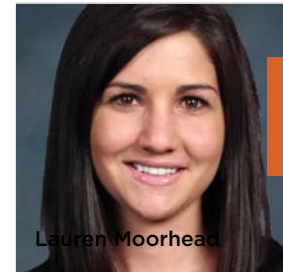


Lori Coffey

Curriculum Developer,
ConnectWise

(/speakers/lori-coffey)

PRESENTED BY:



Lauren Moorhead

Consulting Team Manager,
ConnectWise

(/speakers/lauren-
moorhead)



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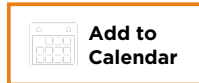
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(<http://webroot.com/partners>)

Hiring a High Performance Sales Professional is Easy... If You Have the Right Tools Sponsored By: CharTec

VENDOR

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Orlando M
ROUND 2 11:15 -12:15 PM

SESSION DETAILS

Are you tired of dealing with uneducated sales people? Sick of hearing excuse after excuse for not getting the results that you're looking for? Does hiring bad sales person after bad sales person have you ready to throw your hands up in defeat?

If you answered yes to any of the above questions, then this session is one you can't miss.

We've all been there. We've hired a sales candidate that just seems to have IT, but 6 months down the line, you're hearing excuses after excuse for why they're not performing.

But is there another way?

Join CharTec CEO and IT Sales Veteran, Mr. Alex Rogers, as he takes a dive into hiring an effective sales professional. Attendees can expect to receive/learn:

- The 7 must-haves before you hire
- Signs to look for in a good candidate
- A high-level roadmap for the first 90 days of employment

LEVEL: 201, 101, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



PRESENTED BY:



Alex Rogers

Founder and CEO, CharTec

(/speakers/alex-rogers)

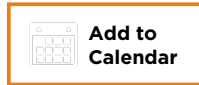


How Datto's Helped Partners Make Over a Quarter Billion Dollars in Two Years

Sponsored By: Datto

VENDOR

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Bayhill 23
ROUND 2 11:15 -12:15 PM

SESSION DETAILS

We have assessed our fastest growing Partners. We know how they're doing it and in this session, we will share with you all of their secrets. From a Sales and Marketing perspective as well as how to position your own overall total data protection strategy. This is a very forward thinking session where everybody will walk away with some value. Please join us.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:

datto

(/sponsors/datto)

PRESENTED BY:



Christine Gassman
 Manager of Partner Development, Datto

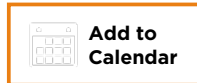
(/speakers/christine-gassman)



How to Add Value and Increase MRR with NO Ongoing Costs

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Orlando M
ROUND 9 4:00 -5:00 PM

SESSION DETAILS

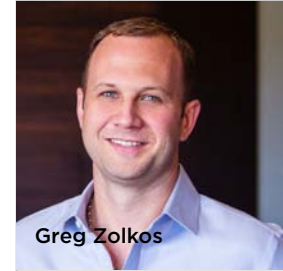
The sourcing of telecommunications network services has undergone transformational change over the last decade creating unprecedented opportunities for IT solutions providers, VARS and MSP's. Specifically, there are many reasons why IT solutions providers are poised to inherit the multibillion dollar market for the sourcing of telecommunications services. Position your firm to make MRR with no ongoing costs. Carriers are paying 10-20% each month of your customer's service bills for the life of the account, why not collect the free commissions? By attending this session you will gain insight to identify opportunities, leverage carrier services, save your clients money and build a new recurring revenue stream.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise Partner

ROLE: Owner/Executive, Operations

PRESENTED BY:



Greg Zolkos

CEO, Atlas Professional Services, Inc.

(/speakers/greg-zolkos)



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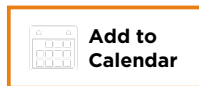


How to Build a \$2 Billion SaaS Business in 6 Years

Sponsored By: Wise-Sync

VENDOR

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 17

ROUND 2 11:15 -12:15 PM

SESSION DETAILS

Xero's Jamie Sutherland will share personal anecdotes and lessons learned over the past few years including the importance of having a strong platform that is native to the cloud, establishing and building on key partnerships, ensuring a solid mobility strategy and what it takes to deliver constant innovation to your clients.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/wise-sync)

PRESENTED BY:



Jamie Sutherland

Global GM, US Products & Solutions, Xero

(/speakers/jamie-sutherland)



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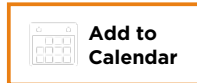
/user/labtechsoftware?feature=watch)

How To Deliver Cost Effective On-Going Security Services with Network Detective Inspector

Sponsored By: RapidFire Tools

VENDOR

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Florida B
ROUND 7 11:15 -12:15 PM

SESSION DETAILS

Cyber Security is a growing opportunity for MSPs with clients in the SMB sector. Learn how to leverage Network Detective Inspector to provide an automated security offering that will generate additional revenue and identify new projects and opportunities. This plug-and-play offering scans for network changes, anomalous user behavior, as well as threats and vulnerabilities. See how features -- including fully automated reporting, tech alerts, and client security bulletins -- come together to provide a high-value, cost-effective security service that will elevate your managed services practice miles ahead of the rest of the pack.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



IT Assessments Made Fast & Easy

(/sponsors/rapidfire-tools)

PRESENTED BY:



Win Pham
Vice President Software Development, RapidFire Tools

(/speakers/win-pham)



Setting up Your Sales Department

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 25

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

Turn your company into a lean, mean sales machine. In this session, ConnectWise Partner, Robb Rogers, Osprey Strategic Research, will show you how to create scalable sales processes from the beginning. You'll learn how to setup these sales processes in the ConnectWise Sales and Marketing modules to generate more opportunities, and more closed deals. Additionally, we'll go through what you should be looking for when hiring your first salesperson, and how to create a proper compensation package. By the end of this session you'll understand what your sales professionals should be doing, how to monitor them, and how to pay them accordingly.

LEVEL: 101

POWERED BY: ConnectWise Partner

ROLE: Sales, Owner/Executive

PRESENTED BY:



Robb Rogers

President, Osprey Strategic Research, LLC

(/speakers/robb-rogers)



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HR Best Practices Using ConnectWise

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Celebration 7

ROUND 10 5:30 -6:30 PM

SESSION DETAILS

Your service business runs in ConnectWise and there's no reason why you shouldn't be managing your employee information there as well. This session will walk you through everything you need to know to get started or improve your existing HR process. Learn the best way to onboard and track employee info, PTO accruals, vacation requests and more. Discover how to incorporate automation into your processes using ConnectWise workflows. Leave with tips, tricks and tried and true practices you can implement right away.

LEVEL: 101, 301, 201

POWERED BY: ConnectWise

ROLE: Human Resources

PRESENTED BY:



Kim Bailey

Business Consultant,
ConnectWise

(/speakers/kim-bailey)



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Mayron Herrera, President
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Intro to Procurement Lab

HANDS-ON LAB

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Celebration 1
ROUND 6 - ROUND 7 10:00 - 12:15 PM

SESSION DETAILS

ConnectWise enables you to efficiently manage the Procurement Life Cycle to ensure products are ordered, tracked and shipped correctly. If you are new to the Procurement module or you want to learn best practices and get hands-on training, this lab is for you! Learn how to create Purchase Orders, receive and ship products as well as use reports to help you make changes to your processes.

LEVEL: 101

POWERED BY: ConnectWise

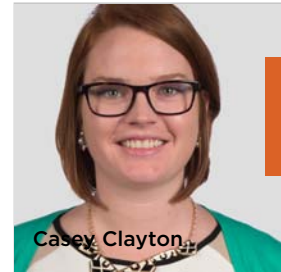
ROLE: Operations

PRESENTED BY:



Business Consultant,
ConnectWise

(/speakers/jill-small)
PRESENTED BY:



Partner Support Consultant,
ConnectWise

(/speakers/casey-clayton)



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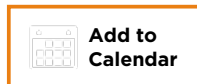
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Invoicing and GL Lab

HANDS-ON LAB

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Celebration 1
ROUND 1 - ROUND 2 10:00 - 12:15 PM

SESSION DETAILS

Creating timely, professional, and most importantly, accurate invoices will leave a lasting, positive impression on customers, and will help to build rapport. This hands-on lab will cover everything you need to know about invoicing in ConnectWise. You will learn how to master the invoicing process for standard and agreement invoices, create down payments and restrict them, and become proficient in mapping products to your GL Accounts. You will walk away with the hands-on experience you need to properly implement invoicing within ConnectWise for your business.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Finance

PRESENTED BY:



David Watts
Consulting Team Lead,
ConnectWise

(/speakers/david-watts)

PRESENTED BY:



Max Cooper-Dowda
Premium Support Consultant,
ConnectWise

(/speakers
/max-cooper-dowda)



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[SPEAKERS \(/SPEAKERS\)](#)
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Is there Opportunity in Big Data for MSPs?

PANEL

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 17

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

Data is everywhere, that's the easy part. Big data is the challenge. How can partners truly monetize big data? What does it take to transform big data into real, actionable business insights, and make money? Join this panel session to learn from partners who are doing just that.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive



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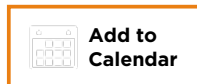
(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

Jeopardy Tips & Tricks Beginner

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 25

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

LET'S PLAY... JEOPARDY! New to ConnectWise and looking to learn some awesome tips and tricks? This is the session for you! In this competitive (and fun) gameshow style session you'll pick up helpful advice on topics like:

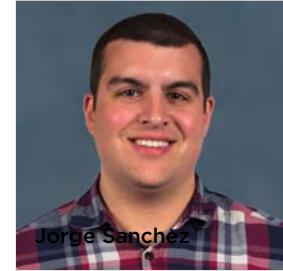
- Automatic emails based on tickets
- Navigating the software
- Inside info on the ConnectWise Marketplace
- Recurring Tickets ... and so much more!

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Operations, Service Delivery

PRESENTED BY:



Jorge Sanchez
Business Consultant,
ConnectWise

(/speakers/jorge-sanchez)



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Jeopardy Tips & Tricks Advanced

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Bayhill 31

ROUND 8 2:45 -3:45 PM

SESSION DETAILS

LET'S PLAY... JEOPARDY! Do you know ConnectWise, but are not sure if you are fully utilizing everything it has to offer? This is the session for you! In this competitive (and fun) game show style session you'll pick up helpful advice on topics like:

- Agreement entitlement process
- Setting up labor costs
- Tracking time accruals
- Understanding the financial dashboard

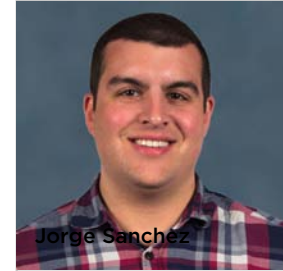
You will leave this session with the tips and tricks you need to make ConnectWise much more powerful, while having fun! If you are new to ConnectWise, be sure to check out the 101 Tips & Tricks session!

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Operations, Service Delivery

PRESENTED BY:



Jorge Sanchez
Business Consultant,
ConnectWise

(/speakers/jorge-sanchez)



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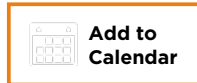
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Join the Fight Against Cyber Threats. MSPs: It's Good for Your Business

Sponsored By: Webroot

VENDOR

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Florida C
ROUND 2 11:15 -12:15 PM

SESSION DETAILS

When modern cyber threats successfully infect your endpoints, they take up time and money for you and your customers. Let's face it - manually removing infections and managing antiquated antivirus products is a costly hassle. But what if we told you that you could differentiate yourself from competitors by offering your customers a smarter, cost-effective cybersecurity solution?

Join our breakout session for insight into today's threat landscape, what forward-thinking businesses can do to navigate it, and how the power of collective threat intelligence can make endpoint security profitable. You'll walk away with key information that will help you open doors, close deals and grow your business.

LEVEL: 101, 201, 301

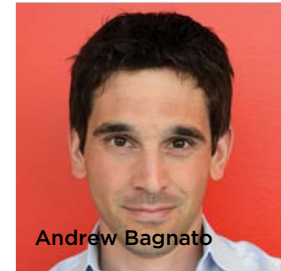
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(/sponsors/webroot)

PRESENTED BY:



Andrew Bagnato
LabTech Technical Account Manager, Webroot

(/speakers/andrew-bagnato)



KPIs that Matter: Reporting for a Service Manager

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Orlando M

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

You manage what you measure – successful service organizations have specific metrics they must achieve. Customer satisfaction is vital for service teams, and can be measured using specific reports in ConnectWise. This session will discuss the reports available to a service manager including SLA goal tracking, SLA adherence, as well as employee utilization reporting. Walk away with the confidence that you have the right tools to help ensure that your company is in compliance, and billable!

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Service Delivery

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 8 2:45 -3:45 PM (/SESSIONS
/KPIS-THAT-MATTER-FOR-A-SERVICE-MANAGER
/SESSIONDETAIL-8)

PRESENTED BY:



Aaron Boone

Business Consultant,
ConnectWise

(/speakers/aaron-boone)



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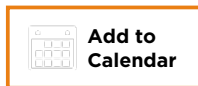
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KPIs that Matter: Using the Financial Dashboard to Keep an Eye on Monthly Profits

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Florida C
ROUND 6 10:00 -11:00 AM

SESSION DETAILS

You have already completed tickets, projects and your monthly contract billing - now it is time to see how well your company is doing financially. Join this session to learn how you can get the most out of the Financial Dashboard. Do you know your margins for services, projects and agreements? Do you know what your effective rates are? This session will give you the necessary guidance to answer these questions and more!

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Finance

PRESENTED BY:



Kay VanDerLeest

Senior Business Consultant,
ConnectWise

(/speakers
/kay-vanderleest)



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KPIs That Matter: Reporting for an Owner

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Florida C

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Good business decisions drive the success of any organization, and decision-making is made easier when you have the necessary information at hand. This session will introduce you to the standard reports in ConnectWise, a vital tool for gathering the data you need to push your company in the right direction. We'll walk through resource planning and forecasting, and the Report Frequency Matrix, all of which can help bring your company to the next level.

LEVEL: 101, 201, 301

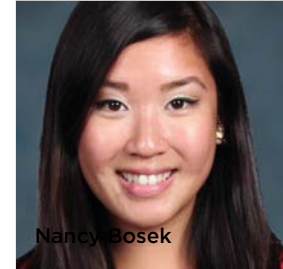
POWERED BY: ConnectWise

ROLE: Owner/Executive

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/KPIS-THAT-MATTER-REPORTING-FOR-AN-OWNER/SESSIONDETAIL-10)

PRESENTED BY:



Nancy Bosek

Education Consultant,
ConnectWise

(/speakers/nancy-bosek)



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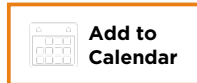
LEARN MORE

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Best Practices: Large Partners Sales Handoff from Sales to Support. More than 50 Users.

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Bayhill 25
ROUND 8 2:45 -3:45 PM

SESSION DETAILS

Defining the sales handoff process is critical to keeping all business processes operating smoothly and efficiently. Designed for businesses with 25+ people, this session will teach you how to leverage the tools in ConnectWise to pass won sales seamlessly to the appropriate teams in your organization. We'll review workflow rules, CRM surveys and standard templates - all serving to help document the necessary details, and make the transition as clean as possible.

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Sales

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/LARGE-PARTNERS-SALES-HANDOFF-SALES-TO-SUPPORT/SESSIONDETAIL-10)

PRESENTED BY:



Chris Romano
Senior Business Consultant,
ConnectWise

(/speakers/chris-romano)



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Lead Smart - High Performance Leadership

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 21

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

Jason Young teaches that leaders develop, motivate and empower people to achieve extraordinary results while providing vision and guidance throughout the entire process. Truly smart leaders know that is more than a mere statement of fact, but rather a personal and professional challenge to be met everyday. Faced with two choices - lead smart or die - they'll know what to do to achieve your organization's success. They will find out the new definition of becoming a person of influence and how that applies to everyone in your organization. Your leaders will hear how organizing talent to build effective teams creates an incredible workplace culture and how applying successful coaching skills will help your teams excel. They'll learn how to handle change - for better or worse - and how effective disagreement management can enhance team productivity.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive

PRESENTED BY:



Jason Young

President, LeadSmart, Inc.

(/speakers/jason-young)





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Leverage ConnectWise to Automate Service

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Florida C

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

Automation is key to business success. When your system performs the work for you, time is saved and bandwidth is increased. ConnectWise simplifies the automation process bringing more efficiency to your organization. In this session we'll review standard notes, standard templates and the latest in ConnectWise labs all designed to automate the repeatable tasks that you spend time on each day. Leave this session with the knowledge to leverage automation, implement powerful workflow rules and apply proven automation processes to your business.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Service Delivery, Operations

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 6 10:00 -11:00 AM
(/SESSIONS/LEVERAGE-CONNECTWISE-TO-AUTOMATE-SERVICE/SESSIONDETAIL-6)

PRESENTED BY:



Ophelia Clarke

Business Consultant,
ConnectWise

(/speakers/ophelia-clarke)



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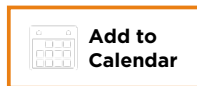
EXPLORE THE SUITE

(<http://www.connectwise.com/solutions/connectwise-business-suite>)

Leverage Procurement to Minimize Loss and Maximize Efficiency

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Celebration 3
ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Your business is growing and so managing constantly changing inventory levels can be a daunting task. Loss of inventory through carelessness or theft can cost your business greatly. Auditing and maintaining a proper inventory is becoming an increasing need to support your business's success and that's where the ConnectWise Procurement module comes in. Learn how to use this tool to accurately track the location of inventory and automate orders when products are low. We'll also discuss time-saving naming conventions and crucial reporting for procurement.

- Please note, if you're not an expert in Procurement, start with the hands-on Introduction to Procurement Lab

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Operations, Owner/Executive

PRESENTED BY:



Jeanine Sullivan
Senior Business Consultant,
ConnectWise

(/speakers/jeanine-sullivan)



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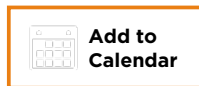
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Leveraging Mobile to Reach a New Level of Customer Engagement

PANEL

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Bayhill 25
ROUND 9 4:00 -5:00 PM

SESSION DETAILS

84% of CIOs rank mobile solutions as their top strategy for competitive differentiation. Why? Join this panel discussion to chat through the increasing potential of mobile and ever-dropping barriers. How exactly can you navigate this opportunity?

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Service Delivery, Owner/Executive, Operations



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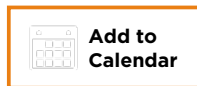
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/user/labtechsoftware?feature=watch)

Leveraging the Email Connector to Maximize Automation

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Florida A
ROUND 3 1:45 -2:45 PM

SESSION DETAILS

The email connector is the most common and simplest form of automation within ConnectWise. Is your organization taking full advantage of the features built into the email connector? This session will walk you through the 301 setup and configuration. You will learn to automate everything from appending tasks and notes, to adding resources and time entries. By combining workflow rules, email connector tags, parsing rules and auto-templates you can maximize the power of automation with your email connector.

LEVEL: 301

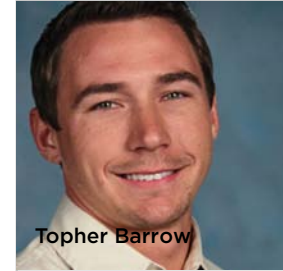
POWERED BY: ConnectWise

ROLE: Service Delivery

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 8 2:45 -3:45 PM (/SESSIONS/LEVERAGING-THE-EMAIL-CONNECTOR-TO-MAXIMIZE-AUTOMATION/SESSIONDETAIL-8)

PRESENTED BY:



Topher Barrow
Senior Education Consultant, ConnectWise

(/speakers/topher-barrow)



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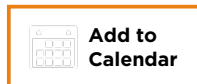
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Selling and Transitioning to User Based Billing

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Florida C

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

Whether you've just moved to the Managed Service business model, or have been there for a while, this session will help laser focus your offerings to increase profitability. Join Veteran ConnectWise Partner (and Locked and Loaded Facilitator) Michael Capps and ConnectWise Business Consultant Aaron Boone as they walk you through valuable processes you can implement. The session will feature a discussion about Managed Service pricing models, including the ConnectWise User Centric feature. Don't miss this session! You will receive a 12, 24 and 36 month model to utilize in creating your own business plan! Leave this session with the knowledge to develop your own managed services business plan and ensure that your clients see you as their one and only trusted IT advisor.

LEVEL: 101

POWERED BY: ConnectWise, ConnectWise Partner

ROLE: Owner/Executive

PRESENTED BY:



Business Consultant,
ConnectWise

(/speakers/aaron-boone)

PRESENTED BY:



VP Technology Services,
Cybertron International, Inc.

(/speakers/mike-capps)



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Marketing Mini Lab

HANDS-ON LAB

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Celebration 3
ROUND 10 5:30 -6:30 PM

SESSION DETAILS

Marketing is imperative to the growth and success of your business, but how can you take it to the next level? This hands-on lab will give you experience tracking marketing efforts in ConnectWise. You will learn all you need to know about Tracks, Opportunities, Reports, Marketing Manager, and more! You will leave this session with the knowledge to track and measure ROI for your current and future Marketing Campaigns.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Marketing

PRESENTED BY:

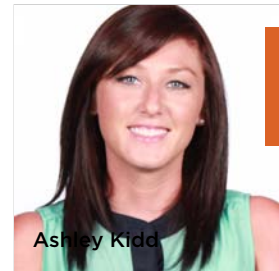


Kristin Youmans

Business Consultant,
ConnectWise

(/speakers/kristin-youmans)

PRESENTED BY:



Ashley Kidd

Partner Support Consultant,
ConnectWise

(/speakers/ashley-kidd)



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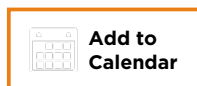
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Microsoft Cloud Solutions = Partner Profit

Sponsored By: Microsoft

VENDOR

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Florida A

ROUND 2 11:15 -12:15 PM

SESSION DETAILS

Industry experts expect public IT cloud services to reach over \$107 billion by 2017 (IDC). With Office 365, Azure, and CRM Online, partners have a tremendous opportunity ahead of them. In this session, we will follow the path to profitability with Microsoft Cloud Solutions, and explore how the Cloud Solution Provider program (CSP) can amplify your managed services practice.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/microsoft)

PRESENTED BY:



JJ Antequino

Partner Technology
Strategist, TS2 Team,
Microsoft

(/speakers
/jj-antequino)



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Millennials and the Modern Workforce

PANEL

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 17

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

Millennials have entered the workplace and chances are, they now makeup a majority of your team. Check out this unique panel session where a group of millennials will share what they look for in a workplace. Learn what challenges they face, what keeps them inspired and motivated, and how they define success. We'll also explore selling to millennials - how do millennials like to buy and is it different from a traditional buyer?

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive



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Scaling Your Business to Maturity

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 19

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

What needs to happen for an MSP to grow from infancy to healthy full blown adulthood? How does a company “morph” as it goes from a bootstrapped startup to a \$10M+ machine? How do your team and your service offering need to evolve to stay on track as you grow? Dave Cava will review the stages of MSP Business Maturity and walk us through how to get from HERE to THERE. Along the way you will be able to identify where your company is at on the roadmap and clearly identify action steps to keep your company moving in the right direction.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/MSP-EVOLUTION-PART-1-SCALING-YOUR-BUSINESS-TO-MATURITY/SESSIONDETAIL-10)

PRESENTED BY:



Dave Cava

COO, Proactive Technologies

(/speakers/dave-cava)



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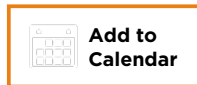
(<http://www.veeam.com/service-providers.html>)

Nilear – Eliminating the “Hide and Seek” with your Help Desk Team

Sponsored By: Nilear

VENDOR

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Florida A
ROUND 7 11:15 -12:15 PM

SESSION DETAILS

If you are tired of tickets drifting from day to day, “Waiting On” tickets piling up, “Black Hole” tickets with no budget accountability, this is the session for you!!!! In this presentation by Chris Schalleur of Nilear, learn 5 immediate impact items with visibility and consistent goal setting for your help desk and service delivery team. We can help you utilize ConnectWise to streamline your help desk and service teams to deliver immediate results.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/nilear)

PRESENTED BY:



CEO, Christo IT Services

(/speakers/christopher-schalleur)



Onboarding and Offboarding Employees

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Florida A

ROUND 8 2:45 -3:45 PM

SESSION DETAILS

Onboarding a new employee is more than showing them where their desk is. Just like an engine needs the correct parts and testing to function effectively, your new colleague will need the right information and training to be set up for success. A company's employees are their brand ambassadors and leaving a great first impression will go a long way. The same is true for those leaving the company. By formalizing your process you guarantee a successful onboarding or offboarding. This breakout will help you put your best foot forward by defining, documenting, tracking and automating your processes in ConnectWise. Additionally, you'll learn how to streamline these processes through the use of Project Templates, Tracks, and Service Boards. Remember- if it's not in ConnectWise, it didn't happen.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Human Resources

PRESENTED BY:



Jennifer Six
Education Consultant,
ConnectWise

(/speakers/jennifer-six)



Simplifying the *as-a-Service* Model

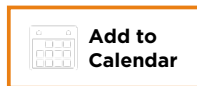
- ✓ Standardize
- ✓ No Risk
- ✓ Positive Cash Flow
- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

(<http://www.greatamerica.com/haar/>)

Onboarding Clients, An Interactive Experience with Tips from the Field!

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Florida C
ROUND 3 1:45 -2:45 PM

SESSION DETAILS

You won a deal, awesome! Now, what's next? We find many MSP's and service providers do not know how to answer that question. Often times, when they ask employees of the newly won business, everyone has different expectations. What should you do first? Do you set up invoicing? Do you install your agent? How about a credit check? Join the Dynamic Duo - Chris Johnson from Untangled Mega Solutions, and Charles Love from Big Sur Technologies in mapping out the client onboarding process this session. Head's up! This will be an interactive session, come awake and ready to interact!

LEVEL: 101, 201, 301

POWERED BY: ConnectWise Partner

ROLE: Owner/Executive, Service Delivery

PRESENTED BY:

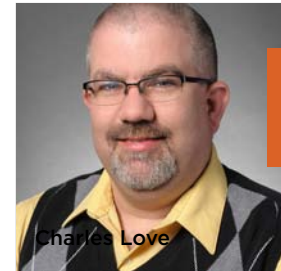


Chris Johnson

CEO, Untangled Solutions

(/speakers/chris-johnson)

PRESENTED BY:



Charles Love

Director of Service and Cloud Operations, Big Sur Technologies

(/speakers/charles-love)



(<https://www.chartec.net>)

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Opportunities vs. Legalities: Winning the Battle

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 31

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

Every MSP wants to expand its business but MSPs that don't identify and manage the risks of business expansion will find themselves in a heap of legal trouble - which means legal fees that you probably can't afford. Business interruption, compliance issues, employee gripes, reputational damage - all of that (and more) needs to be considered whenever an MSP explores the idea of growth. So how can your company recognize the legal issues and manage the risks in a cost-effective way? What can you do right now to help ensure that your company's growth won't be stifled or delayed by common (but preventable) legal hassles? Attend this interactive session and find out.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive

PRESENTED BY:



Bradley Gross

Founding Partner, Law
Office of Bradley Gross, P.A.

(/speakers/bradley-
gross)



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(<http://webroot.com/partners>)



Ownership Does Not Equal Leadership

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Bayhill 19
ROUND 4 3:00 -4:00 PM

SESSION DETAILS

A common discussion topic in channel is how to attract, motivate, develop and retain the best staff. Many business owners assume sharing ownership is the best way to achieve finding the best staff and believe it to be what their staff want. They learn the truth in time and at their cost. Join ConnectWise Partner, Gareth Johns as he highlights the risks of sharing ownership and offers some alternative strategies gleaned from over 25 years of experience.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise Partner

ROLE: Owner/Executive

PRESENTED BY:



Gareth Johns

Managing Director, Business
Computer Solutions Ltd

(/speakers/gareth-johns)



Simplifying the as-a-Service Model

- ✓ Standardize
- ✓ No Risk
- ✓ Positive Cash Flow
- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

(<http://www.greatamerica.com/haar/>)



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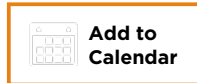
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Partner Talk: The as-a-Service Model Is As Good As It Sounds - But You Can Make It Better

Sponsored By: GreatAmerica

VENDOR

WHEN & WHERE



DAY 2 Thursday, November 12
 ROOM: Florida B
 ROUND 2 11:15 -12:15 PM

SESSION DETAILS

Many MPS are self-financing their HaaS program while others are using a third party like the GreatAmerica HaaR® program. During this breakout, Paul Dippell examines the growth, profitability and service quality of MSPs that have adopted an as-a-Service model. Explore the pros and cons of both models and the real-life transformative results of a Solution Provider who went from cash to HaaS to HaaR.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

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[\(/sponsors/great-america\)](#)

PRESENTED BY:



CEO, Service Leadership, Inc.

[\(/speakers/paul-dippell\)](#)



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Picanomics: The New MSP Math

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Orlando M

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

During this advanced session, industry leader Gary Pica will share both macro and micro economic principles of the top 10% of IT providers. The MSP industry has changed and so have key economic drivers. Top providers are enjoying profit margins that are 3 times the industry average. To achieve greater profitability, you need to have a command over the cost drivers and revenue levers. During this session you will learn:

- A framework that will guide you to higher profit margins
- One number that will change your business
- 3 key metrics that impact every MSP

During this session you will calculate the unrealized profitability locked inside your business and develop a plan to unlock it. If higher profitability is your priority you don't want to miss what Gary has to say.

LEVEL: 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive, Operations

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 8 2:45 -3:45 PM ([/SESSIONS/PICANOMICS-THE-NEW-MSP-MATH/SESSIONDETAIL-8](#))

PRESENTED BY:



Gary Pica

CEO, TruMethods

([/speakers/gary-pica](#))



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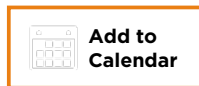
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Planning for Cloud Profitability from Day One

Sponsored By: Profit Bricks

VENDOR

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 19

ROUND 2 11:15 -12:15 PM

SESSION DETAILS

Cloud infrastructure is opening new opportunities for managed service providers to deploy and maintain virtual machines and virtual data centers in hosted environments. Capitalizing and profiting on this transition requires strategic planning and execution. In this session, The 2112 Group's Larry Walsh and Profit Bricks will share how MSPs can make the most out of cloud infrastructure from day one and into the future.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/profitbricks)

PRESENTED BY:



CEO, The 2112 Group

(/speakers/lawrence-m-walsh)



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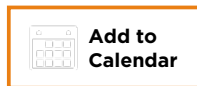
(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

Pricing and Packaging Strategies to Dramatically Increase Recurring Revenue

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Orlando N
ROUND 3 1:45 -2:45 PM

SESSION DETAILS

Gary Pica will share proven methods for pricing and packaging your IT service offerings. The service offering is at the center of every MSP's success. Many MSPs are negatively impacting sales and profitability and they don't even know it! If your recurring revenue is not increasing each and every month, you need to hear what Gary has to say.

- Learn about pricing managed services and cloud: learn guidelines that will take the mystery out of pricing your support offering
- Packaging your offering: Your support offering impacts sales, service delivery and profit margins
- Top 3 Mistakes: Learn the 3 most common mistakes IT providers make
- Learn the answers to your burning questions: What should I include? How many offerings should I have? How should I present the offering?

How you package and price your support offering is the most important decision most IT providers will make. Learn key best practices that ensure you will get it right.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive, Operations

PRESENTED BY:



Gary Pica

CEO, TruMethods

(/speakers/gary-pica)



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LEARN MORE

(<http://www.veeam.com/service-providers.html>)

Using ConnectWise to Manage Software Releases

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Bayhill 31

ROUND 6 10:00 -11:00 AM

SESSION DETAILS

By managing projects in ConnectWise, you have insights into phases, budgets, milestones and more therefore ensuring your project is managed to perfection. If you are a Software Developer using the Waterfall or Agile approach, learn how you can use the ConnectWise Project module to fit your management style. You will learn everything from configuring your project, to receiving customer feedback through the customer portal and building workflows and reports for your projects.

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Operations

PRESENTED BY:



April Taylor

Senior Product Manager,
ConnectWise

(/speakers/april-taylor)



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EXPLORE THE SUITE

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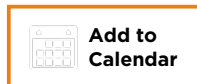
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Projects Mini Lab

HANDS-ON LAB

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 1

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Projects, when used to their full potential, can help ensure proper time management, scheduling, and billing. They allow you to successfully manage complex work plans that could involve multiple departments. In this hands-on lab, you will learn to leverage features like Project Templates, Project Scheduling, and Project Invoicing to their fullest. You will discover how utilizing Projects allows for easier tracking, scheduling, and consistency!

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Operations

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/PROJECTS-MINI-LAB/SESSIONDETAIL-10)

PRESENTED BY:



Jake Coffman

Partner Support Team Lead,
ConnectWise

(/speakers/jake-coffman)

PRESENTED BY:



Omar Abdel-Aziz

Senior Partner Support
Consultant, ConnectWise

(/speakers/omar-abdel-aziz)



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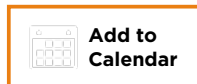
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QBR: What to Include

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Orlando M

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

Quarterly Business Reviews are crucial to maintaining a successful business relationship with customers. These meetings set expectations and manage any existing or potential roadblocks. In order for these meetings to be as impactful as possible, the right information must be discussed. Attend this session to discover what KPIs, reports, and other information should be included in the Quarterly Business Review. You will also learn how to use ConnectWise to make sure these meetings are properly scheduled.

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Owner/Executive

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/QBR-WHAT-TO-INCLUDE/SESSIONDETAIL-10)

PRESENTED BY:



Kay VanDerLeest

Senior Business Consultant,
ConnectWise

(/speakers
/kay-vanderleest)



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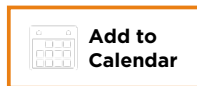
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Real World ConnectWise Problems: Discussion and Collaboration

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Celebration 9
ROUND 3 1:45 -2:45 PM

SESSION DETAILS

Collaboration Exercises: In this session, we're breaking into individual groups for some collaborative roundtable learning. Each group will get the opportunity to discuss real-world business scenarios and challenges together and solve them leveraging ConnectWise. Then each group will share their solution opening the floor for discussion and Q and A.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Owner/Executive, Service Delivery, Operations

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/REAL-WORLD-CONNECTWISE-PROBLEMS-
DISCUSSION-AND-COLLABORATION/SESSIONDETAIL-10)

PRESENTED BY:



Megan Callihan
Education Team Manager,
ConnectWise

(/speakers/megan-callihan)



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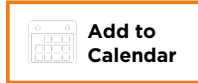
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Regain Visibility in the New Perimeterless, Cloud App World to Increase MRR

Sponsored By: OpenDNS

VENDOR

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Orlando N
ROUND 7 11:15 -12:15 PM

SESSION DETAILS

Target audience: existing customers (highlight new functionality) - business & technical

RMM is great at showing you what software is running on your systems but today's users are accessing cloud applications directly through the browser creating blind spots. At the same time, work is no longer a place you go—it's something we do from home, coffee shops, and airports. That has created a huge blind spot for network perimeter security.

Your customers, who are just trying to do their jobs, are signing up for consumer cloud applications without considering the compliance or business risk. So how do you regain visibility and control in world of roaming users, BYOD and cloud applications?

In this breakout session, learn how to use Umbrella's new Centralized Reports to gain complete visibility that was lost with the eroding network perimeter and cloud applications. See how you can quickly find security risks and identify opportunities to increase sales — all within an easy-to-use dashboard.

In this session, you will learn:

- How Shadow IT is changing the threat landscape.
- How to leverage OpenDNS' Centralized Reports for a global view of security risk and cloud app usage.
- How you can generate new revenue by identifying rogue cloud services and use data-driven sales.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:

PRESENTED BY:



Adrienne Merrick-Tagore

MSP Product Marketing Manager, OpenDNS

(/speakers/adrienne-merrick-tagore)



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Reporting Mini Lab

HANDS-ON LAB

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 2

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

If you're familiar with creating reports in Report Writer, but want to take it to the next level, you should attend this lab. You'll learn how to use some of the 301 and newer features such as dashboards, embedded reports, instant reports, visualizations and forms. You will also learn about future Report Writer enhancements.

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Service Delivery

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/REPORTING-301-MINI-LAB/SESSIONDETAIL-10)

PRESENTED BY:



Brandon Coleman

Education Consultant,
ConnectWise

(/speakers/brandon-coleman)

PRESENTED BY:



Matt Moore

Consulting Team Manager,
ConnectWise

(/speakers/matt-moore)



"The ConnectWise® Business Suite™
streamlines business processes
—everything from sales to billing and ticketing—
to help us grow the business."

Mayron Herrera, President
Synetek Solutions

EXPLORE THE SUITE

(<http://www.connectwise.com/solutions/connectwise-business-suite>)

Reporting: Financial Statements

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 29

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

As a business owner, you are responsible for making the financial decisions for a company, but that is not always the easiest task. This session will walk you through the reports and financial statements that you need to know as a business owner or decision-maker. Business Consultant, Mike Heaton, brings his knowledge from his Master's Degree in Accounting and his background in both Audits and Tax for businesses, to this session. You will leave feeling comfortable with the reports that you must be familiar with to stay within tax and auditory compliance.

- This session will not focus on ConnectWise functionality or accounting packages. It is recommended that you attend the Setup Foundations: Invoicing and GL, session, or the Hands-on Invoicing and GL lab.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Finance

PRESENTED BY:



Michael Heaton

Business Consultant,
ConnectWise

(/speakers/michael-
heaton)



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streamlines business processes
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to help us grow the business."

Mayron Herrera, President
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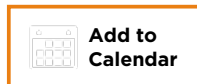
EXPLORE THE SUITE

(<http://www.connectwise.com/solutions/connectwise-business-suite>)

Reporting Lab

HANDS-ON LAB

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Celebration 2
ROUND 1 - ROUND 2 10:00 - 12:15 PM

SESSION DETAILS

Do you have a need for custom reporting, but aren't sure where to start with Report Writer? This hands-on session will introduce you to database concepts, reporting views, and you'll even create a report of your own. Be sure to bring your existing ConnectWise knowledge with you. This includes an understanding of how different areas relate to one another like a service board to a service team, or time entries to tickets.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Service Delivery

PRESENTED BY:



Neil Perkins

Business Consultant,
ConnectWise

(/speakers/neil-perkins)

PRESENTED BY:



Joseph Schreck

Business Intelligence
Consultant, ConnectWise

(/speakers/joseph-schreck)



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Reporting Lab

HANDS-ON LAB

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Celebration 2
ROUND 3 - ROUND 4 1:45 - 4:00 PM

SESSION DETAILS

Are you looking for a better way to collect and compile information from ConnectWise through easy to understand reports and dashboards? Join us for a hands-on lab to learn data concepts and database structures within ConnectWise. Find out how to deploy reports with details; create summary reports, charts, graphs and even user friendly drill-through dashboards. We'll provide real world examples using the Report Writer that you can implement to bring your own organization to the next level.

LEVEL: 201

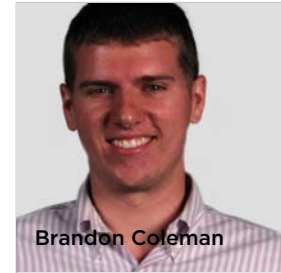
POWERED BY: ConnectWise

ROLE: Service Delivery

ALSO AVAILABLE:

DAY 3 Friday, November 13 **ROUND 6 - ROUND 7 10:00 - 12:15 PM**
[\(/SESSIONS/REPORTING-LAB-201/SESSIONDETAIL-6-7\)](#)

PRESENTED BY:



Brandon Coleman

Education Consultant,
ConnectWise

[\(/speakers/brandon-coleman\)](#)

PRESENTED BY:



Matt Moore

Consulting Team Manager,
ConnectWise

[\(/speakers/matt-moore\)](#)



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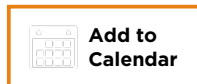
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Revolutionary Service Level Agreements

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 21

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Successful technology companies provide high levels of customer satisfaction, while remaining timely when handling customer support issues. Service Level Agreements (SLAs) hold a lot of power, and when maintained and used properly, can take your business to the next level. In this session we'll discuss how to set SLA goals, and review the tools available in ConnectWise to track these metrics. We'll show you how to use ConnectWise Workflow Rules to create alerts so you avoid breaching an SLA, and how to measure metrics effectively off of your SLAs using different reports and dashboards.

- This session is for partners who have experience with SLAs; if you are new to service level agreements, we recommend attending the SLA Setup Foundations breakout in Round 1

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Service Delivery

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/REVOLUTIONARY-SERVICE-LEVEL-AGREEMENTS/SESSIONDETAIL-6)

PRESENTED BY:



Lee Pruitt
Business Consultant,
ConnectWise

(/speakers/lee-pruitt)



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to help us grow the business."
Mayron Herrera, President
Synetek Solutions



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Sales Flow Lab

HANDS-ON LAB

WHEN & WHERE



Add to
Calendar

DAY 3 Friday, November 13
ROOM: Celebration 1
ROUND 8 - ROUND 9 2:45 - 5:00 PM

SESSION DETAILS

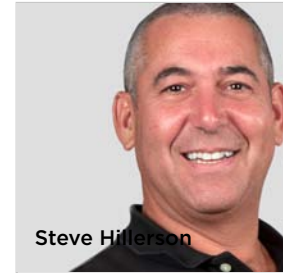
The entire ConnectWise Lifecycle hinges on a well-built sales flow within the system. Effectively using ConnectWise to manage the sales process will streamline everything from sales to invoicing. Throughout this hands on session, you will learn how to implement a sales flow within your organization. You will also work through several examples of opportunity best practices, automation, and the conversion from sales to service and procurement.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Sales

PRESENTED BY:



Steve Hillerson

Senior Business Consultant,
ConnectWise

(/speakers/steve-hillerson)

PRESENTED BY:



Rebecca Simons

Senior Project Manager,
ConnectWise

(/speakers/rebecca-simons)



Simplifying the *as-a-Service* Model

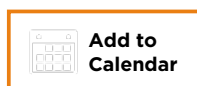
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- ✓ No Risk
- ✓ Positive Cash Flow
- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

(<http://www.greatamerica.com/haar/>)

Sales Management in ConnectWise: Reports and Dashboards

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 23

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

Sales management is key to maximizing your sales team's efforts. Improved sales management can lead to more won opportunities, in less time. This will pave the way to the ultimate goal - increased revenue! You manage what you measure, and it is easy with ConnectWise. In this session, you will learn all about Sales Reporting in ConnectWise. By using dashboards, reports, and workflow rules, you can automate many aspects of the sales process, which will help you stay on top of all of your potential sales.

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Sales

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/SALES-MANAGEMENT-IN-CONNECTWISE-
REPORTS-AND-DASHBOARDS/SESSIONDETAIL-10)

PRESENTED BY:



Michelle Ibrahim
Senior Business Consultant,
ConnectWise

(/speakers/michelle-
ibrahim)



Simplifying the as-a-Service Model

- ✓ Standardize
- ✓ No Risk
- ✓ Positive Cash Flow
- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

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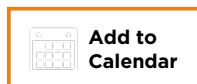
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Sales Prevention Therapy

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Bayhill 23

ROUND 9 4:00 -5:00 PM

SESSION DETAILS

Every Managed Services Opportunity requires 5 closes that develop credibility and pique curiosity. Learn proven ways and techniques to make prospects WANT to keep engaging through the sales process, until the deal is signed.

Join CharTec CEO and sales veteran Alex Rogers, as he reveals the 5 pre-requisites of closing a sale. You don't want to miss this one of a kind session!

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Sales

PRESENTED BY:



Alex Rogers

Founder and CEO, CharTec

[\(/speakers/alex-rogers\)](#)



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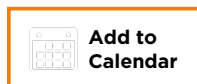
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Sales Strategies and Building Your Pitch

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Celebration 9
ROUND 8 2:45 -3:45 PM

SESSION DETAILS

What do prospects remember after you leave their office? This session will focus on how to increase the perceived value of your pitch in a unique way, while reducing risk aversion behaviors in prospects. We will show how the best in the industry craft their sales pitch to refocus sales appointments back on your business case instead of on best personalities. By the end of this session, you will gain a competitive advantage in your sales pitch over the other proposals and be remembered.

LEVEL: 301

POWERED BY: ConnectWise Partner

ROLE: Sales

PRESENTED BY:



Robb Rogers

President, Osprey Strategic Research, LLC

(/speakers/robb-rogers)



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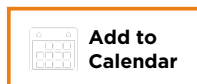
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Selecting (And Maintaining) Top Talent

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 12

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

Your workforce is one of your most important assets. Are you adequately selecting the right pieces to fit your company's puzzle? In this session we'll discuss what to look for when hiring new talent, and what bad behaviors can signal a necessary termination in the near future. We'll also cover hiring best practices such as:

- Standardized employee onboarding
- DISC profiles
- Background checks and more!

Come learn the secrets to selecting the perfect hire, so you can avoid costly departures for your organization.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Sales, Owner/Executive

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/SELECTING-AND-MAINTAINING-TOP-TALENT
/SESSIONDETAIL-10)

PRESENTED BY:



Ron Williams
Business Success Strategist,
ConnectWise

(/speakers
/ron-williams)



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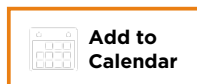
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Service Automation Lab

HANDS-ON LAB

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Celebration 3
ROUND 1 - ROUND 2 10:00 - 12:15 PM

SESSION DETAILS

Perfecting the use of automation across your organization is paramount to increasing efficiency and profitability. How can you leverage automation initiatives in your business to take your service delivery to the next level? Join us in this hands-on lab as we dig into service automation features within ConnectWise. Learn how you can implement ConnectWise tracks, service templates, auto templates and workflow rules in your service delivery process. These tools will save you time, money, and resources allowing you to focus on delivery excellent customer service to your clients.

LEVEL: 101, 201, 301

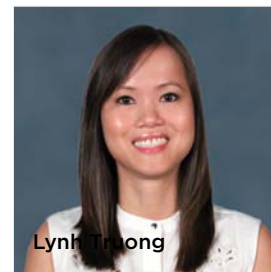
POWERED BY: ConnectWise

ROLE: Service Delivery

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 8 - ROUND 9 2:45 - 5:00 PM
(/SESSIONS/SERVICE-AUTOMATION-LAB/SESSIONDETAIL-8-9)

PRESENTED BY:



Lynh Truong
Business Consultant,
ConnectWise

(/speakers/lynh-truong)

PRESENTED BY:



Sam DeCubellis
Partner Support Consultant,
ConnectWise

(/speakers/
/sam-decubellis)



Simplifying the as-a-Service Model

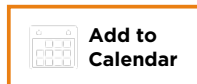
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- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

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Service Automation Lab

HANDS-ON LAB

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Celebration 2
ROUND 8 - ROUND 9 2:45 - 5:00 PM

SESSION DETAILS

Perfecting the use of automation across your organization is paramount to increasing efficiency and profitability. How can you leverage automation initiatives in your business to take your service delivery to the next level? Join us in this hands-on lab as we dig into service automation features within ConnectWise. Learn how you can implement ConnectWise tracks, service templates, auto templates and workflow rules in your service delivery process. These tools will save you time, money, and resources allowing you to focus on delivery excellent customer service to your clients.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Service Delivery

ALSO AVAILABLE:

DAY 2 Thursday, November 12 ROUND 1 - ROUND 2 10:00 - 12:15 PM
(/SESSIONS/SERVICE-AUTOMATION-LAB/SESSIONDETAIL-1-2)

PRESENTED BY:



Lynh Truong

Business Consultant,
ConnectWise

(/speakers/lynh-truong)

PRESENTED BY:



Sam DeCubellis

Partner Support Consultant,
ConnectWise

(/speakers/sam-decubellis)

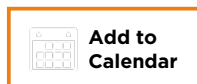


(http://www.efolder.net)

Service Workflows to Transform your Business

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Florida B

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

Now that you understand the basics of workflows, it's time to really step up the automation in your organization. Join Senior Education Consultant, Topher Barrow and veteran ConnectWise Partner, Tim Beard for an in-depth discussion on exactly which workflows you need to put in place today. Stop important items from falling through the cracks with some simple planning. Utilize Active Directory and your RMM to create accountability among your team. Leave this session with a list of workflow rules that are crucial to take your service business to the next level of automation.

LEVEL: 301

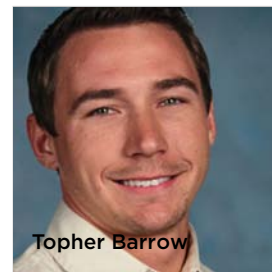
POWERED BY: ConnectWise, ConnectWise Partner

ROLE: Service Delivery

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 6 10:00 -11:00 AM
(/SESSIONS/SERVICE-WORKFLOWS-TO-TRANSFORM-YOUR-BUSINESS/SESSIONDETAIL-6)

PRESENTED BY:



Topher Barrow

Senior Education Consultant,
ConnectWise

(/speakers/topher-barrow)

PRESENTED BY:



Tim Beard

President and CEO,
Networthy Systems

(/speakers/tim-beard)



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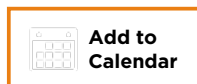
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Setup Foundations: Agreements

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 29

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

Simply put, agreements are contracts. If set up correctly, agreements will drive up profits for your organization. The complexity is in the setup: from what is covered by the contract to the automated billing. Join us if you are new to agreements, and want to master this powerful tool. We will introduce business cases before diving into the setup tables and getting into the details. You will learn how to apply agreements, gain a comprehensive understanding of how agreement billing works, and leave with confidence to create your own agreements in ConnectWise!

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Finance

PRESENTED BY:



Matthew Maiorano

Business Consultant,
ConnectWise

(/speakers/matthew-
maiorano)



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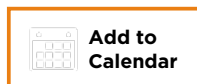


(<http://www.facebook.com>

ConnectWise CampaignDirector

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 31

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

Do you know how effective your marketing campaigns are? Would you like to know if your customers view your marketing emails? Join this session to learn everything you need to know about the new ConnectWise® CampaignDirector™, a dynamic marketing tool that fully integrates with ConnectWise. You will leave this session with the knowledge of how to set up campaign analytics, how to automate opportunity and activity creation, and much more!

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Marketing

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/SETUP-FOUNDATIONS-CONNECTWISE-CAMPAIGNDIRECTOR/SESSIONDETAIL-10)

PRESENTED BY:



Jacquie Eldridge

Associate Product Manager,
ConnectWise Business Suite

(/speakers/jacque-eldridge)



Simplifying the as-a-Service Model

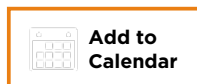
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- ✓ Boost MRR
- ✓ Increase Business Valuation

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Setup Foundations: Sales, Quoting

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 31

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

Sales is the engine that fuels your business – it's crucial to set up processes around sales correctly so you are able to scale your organization with ease. Join us as we deep dive into the setup tables, discuss the impact of creating opportunity status, types and sales statuses. We'll also share best practice suggestions around the setup of opportunities and sales statuses. You'll find out what the 'sales team' is, where the sales team is used within the system, and how classes flow from an opportunity forward.

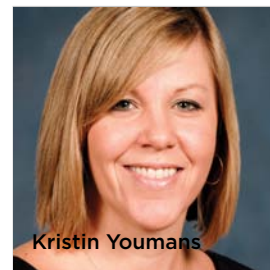
- Please note, this session is intended for a new user to the ConnectWise sales module and will give participants next steps upon returning home to implement these features.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Sales

PRESENTED BY:

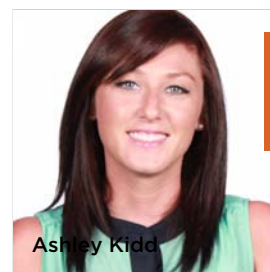


Kristin Youmans

Business Consultant,
ConnectWise

(/speakers/kristin-youmans)

PRESENTED BY:



Ashley Kidd

Partner Support Consultant,
ConnectWise

(/speakers/ashley-kidd)



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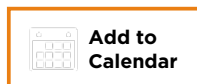
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Setup Foundations: Service Level Agreements

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 23

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Service level agreements (SLAs) can be a massive competitive advantage when selling your services. SLAs provide you and your customers with accountability and act as leverage for monthly recurring revenues via a contract. They allow you to manage your customers' expectations when it comes to response and resolution times. When your SLAs are set up properly, your client will have confidence in your service response time and consistency. This session will help ensure you're earmarking tickets properly when they come in and that they are tracked throughout the system. You'll learn the importance of calendar setup and how to automatically create notifications when SLAs are not met. Finally, we will discuss reports used to track SLAs and ways to improve client satisfaction. If you are new to SLAs, this is the session for you.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Service Delivery

PRESENTED BY:



David Furst

Business Consultant,
ConnectWise

(/speakers/david-furst)



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Synetek Solutions

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Setup Foundations: The General Ledger

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 12

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Setting up your financial structure, data, and processes properly is crucial to ensuring your company is stable, scalable, and able to report effectively. Are you new to the finance and general ledger areas of ConnectWise? Are you intending to implement invoicing using templates? Do you want to know the ins and outs of invoicing, including creating invoices for agreements, down payments or credit memos? If you answered 'yes' to these questions, then this session is for you! We will also discuss tax codes and expenses, rounding out your experience in the setup of these critical financial features. You will leave with the knowledge you need to set up the important finance and accounting areas of ConnectWise.

LEVEL: 101

POWERED BY: ConnectWise, ConnectWise Partner

ROLE: Finance

PRESENTED BY:

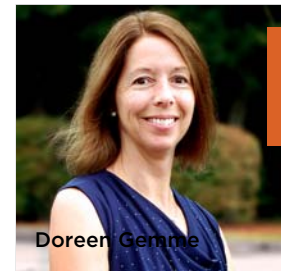


Lynh Truong

Business Consultant,
ConnectWise

(/speakers/lynh-
truong)

PRESENTED BY:



Doreen Gemme

Controller, Flagship
Networks, Inc.

(/speakers/doreen-
gemme)



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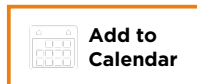
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(<http://www.veeam.com/service-providers.html>)

Setup Foundations: User Centric

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 12

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

User based billing is a hot trend in managed services and many of your customers are probably asking about it. As technology changes, and customers rely on multiple devices throughout their day, billing for these devices has become increasingly difficult. Join this session to learn about UserCentric, a billing tool that enables you to customize how you bill your customers for the assets you manage. In addition, you will learn how you can integrate billing with your active directory counts.

LEVEL: 101, 201, 301

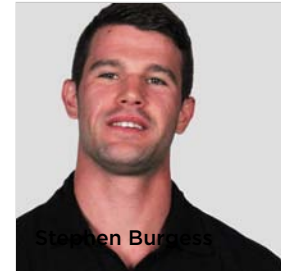
POWERED BY: ConnectWise

ROLE: Finance

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 9 4:00 -5:00 PM
(/SESSIONS/SETUP-FOUNDATIONS-USER-BASED-BILLING-WITH-USER-CENTRIC/SESSIONDETAIL-9)

PRESENTED BY:



Stephen Burgess
Business Consultant,
ConnectWise

(/speakers/stephen-burgess)



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—everything from sales to billing and ticketing—
to help us grow the business."
Mayron Herrera, President
Synetek Solutions



EXPLORE THE SUITE

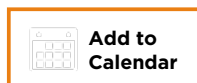
(<http://www.connectwise.com/solutions/connectwise-business-suite>)

Simplify Tax Compliance and Certificate Management - Avoid Unnecessary Costs to Your Business

Sponsored By: Avalara

VENDOR

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 7

ROUND 2 11:15 -12:15 PM

SESSION DETAILS

Doing sales tax right is time-consuming, resource intensive and not core to your business. Doing sales tax right means having accurate tax information for a valid address, knowing the rules, keeping up-to-date with the latest changes, being able to access the information necessary to file and remit quickly and easily, as well as being prepared for defense in the event of an audit.

Learn how you can manage this time consuming and cost intensive process easily and affordably and refocus your time and energy on growing your business!

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/avalara)

PRESENTED BY:



Sales Engineer, Avalara

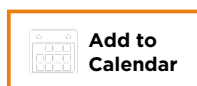
(/speakers/john-sallese)



Simplify Your Offerings and Processes While Increasing Profit

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 7

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

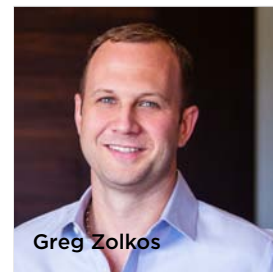
Whether you're an established MSP or a break fix in the mist of conversion you can improve your systems and offerings. Our industry constantly implements change for our clients but we seem to struggle with accepting change in our business by default. There is a need to simplify billings and offerings for our services. Understand your role will change overtime as a result allowing you to focus on what you enjoy and spend the time where you add the most value. In this session you will learn ways to leverage your CW, LabTech and Quosal systems to gain efficiencies through automated processes, lower your operating costs and increase revenues. We will also discuss the benefits of understanding your true offerings cost and the importance of moving towards user centric billing.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise Partner

ROLE: Operations, Owner/Executive

PRESENTED BY:



Greg Zolkos

CEO, Atlas Professional Services, Inc.

(/speakers/greg-zolkos)



(<http://www.connectwise.com>)



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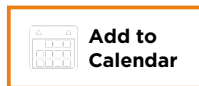
(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

Simplifying Success in the Cloud

Sponsored By: Ingram Micro Cloud
VENDOR

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Bayhill 25
ROUND 2 11:15 -12:15 PM

SESSION DETAILS

Cloud computing continues to turn the technology industry on its head as the channel races to implement new financial models, operational processes, and service delivery methods to support their clients....but it doesn't have to be so complicated! Join Jason Bystrak, Executive Director of Ingram Micro Cloud for North America, to learn best practices for simplifying success in the cloud!

LEVEL: 101, 201, 301

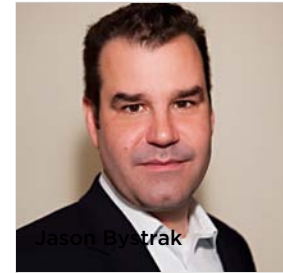
POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/ingram-micro-cloud)

PRESENTED BY:



Executive Director Cloud -
North America, Ingram Micro
Cloud

(/speakers/jason-
bystrak)



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/user/labtechsoftware?feature=watch)

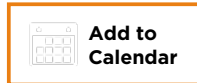
Smarter Conference Rooms. Smarter Meetings.

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VENDOR

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Celebration 9

ROUND 7 11:15 -12:15 PM

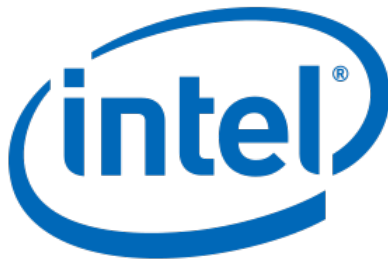
SESSION DETAILS

Whether you are in the room, or a world away, a smart and connected meeting space featuring an Intel® Core™ vPro™ processor based Mini PC with Intel Unite connects everyone, quickly and easily. A simple and instant collaboration capability solution today and a foundation for added capabilities and innovation in the future.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/intel)

PRESENTED BY:



Intel® Unite™ Product Marketing, Intel

(/speakers/jeremy-nicholes)



So You're the Owner - Now What Do You Do

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 23

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

Many people that found companies wake up one day realizing they need to change what they do with their time. They get overwhelmed managing the 1 million emails that come in and trying to meet the needs of staff and customers alike. Arlin will give some guidelines on how to make sure you do your HABU - items that are uniquely your highest and best use - rather than being sucked into the many urgent things that tug at and demand your time.

LEVEL: 101, 201, 301

POWERED BY: HTG

ROLE: Owner/Executive

PRESENTED BY:



Arin Sorensen
Founder and CEO, HTG Peer Groups and Heartland Leadership Group

(/speakers/arlin-sorensen)



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to help us grow the business."

Mayron Herrera, President
Synetek Solutions

EXPLORE THE SUITE

(<http://www.connectwise.com/solutions/connectwise-business-suite>)



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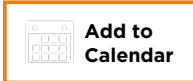
(<http://www.youtube.com>

Speak SMB Security: How YOU Can Be a Security Thought Leader

Sponsored By: OpenDNS

VENDOR

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Orlando L
ROUND 2 11:15 -12:15 PM

SESSION DETAILS

Cybercrime is headline news, but while the media focuses on enterprise and government breaches, small business owners are left hungry for information relevant to their businesses. This gives MSPs who know how to 'Speak SMB Security' an unprecedented opportunity to become known as thought leaders in their community and market their services without spending a single dollar.

Join Dima Kumets, Sr. Product Manager at OpenDNS to learn engaging and relevant SMB security content that can put you in front of prospects that matter. Dima will also be joined by executives from profitable and growing MSPs who will share their best practices for using security presentations to grow monthly recurring revenue.

In this session, you will learn how to:

- Frame the threatscape in a way that is interesting and relevant for your SMB customers.
- Use the OpenDNS turnkey presentations to be a thought leader in your community.
- Get invited to present to an audience of potential customers, turning presentations into new business.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



PRESENTED BY:



Sr. Product Manager,
OpenDNS

(/speakers/dima-kumets)



Standardize Your Processes Using an ITIL Framework

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Florida B

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

Fine-tuned client and internal standardized processes are a key to a successful business. Every client should have the same great experience with your company and they should have an agreed upon expectation of how services are delivered. Join this session to learn how you can use Configurations, Service Templates and Workflow Rules in ConnectWise to achieve ITIL best practices. You will learn how ITIL can help your business improve quality, customer satisfaction, staff retention and more!

LEVEL: 101, 201, 301

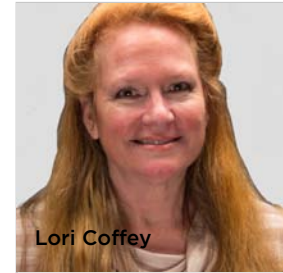
POWERED BY: ConnectWise

ROLE: Operations

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 6 10:00 -11:00 AM
(/SESSIONS/STANDARDIZE-YOUR-PROCESSES-USING-AN-ITIL-FRAMEWORK/SESSIONDETAIL-6)

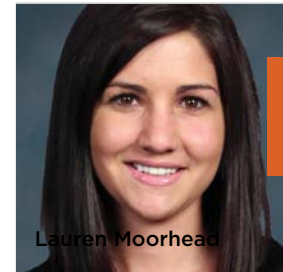
PRESENTED BY:



Lori Coffey

Curriculum Developer,
ConnectWise

(/speakers/lori-coffey)
PRESENTED BY:



Lauren Moorhead

Consulting Team Manager,
ConnectWise

(/speakers/lauren-moorhead)

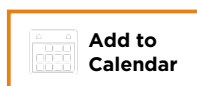


(http://www.efolder.net)

Strategic Agreement Building: Managing Complicated Agreements to Offer Flexible Services

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Orlando L

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

Advanced use of agreements within ConnectWise will allow you to handle unique billing scenarios that arise with customers. How do you handle a monthly maintenance contract with clients, ensuring technicians enter all time but avoiding billing anything to the client? What's a suggested way to automate as much as possible when selling renewable products? Agreements are a way to capture recurring revenue and should work in conjunction with your Quoting and RMM tools to leverage the power of the ConnectWise Business Suite.

- If you're new to agreements, this breakout isn't recommended. All participants should understand the basics of an Agreement, including setup of Agreement types, billing of products, and application Units. If this agreement session isn't for you, here are suggested alternatives:
 - Setup Foundations - Agreements (Round 1)
 - Agreement Hands-On Lab (Round 3 and 8)

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Finance

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 8 2:45 -3:45 PM [\(/SESSIONS/STRATEGIC-AGREEMENT-BUILDING-MANAGING-COMPLICATED-AGREEMENTS-TO-OFFER-FLEXIBLE-SERVICES/SESSIONDETAIL-8\)](#)

PRESENTED BY:



Mitchell Rollo
Education Consultant,
ConnectWise

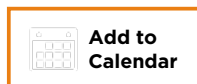
[\(/speakers/mitchell-rollo\)](#)



Structuring Service Boards and Alerting Best Practices

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Florida A

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

How much time do you spend editing and updating automated tickets from your RMM tool? If you said something other than "none," this is the breakout for you! Learn from long time ConnectWise/LabTech partner James Riley, JNR Networks and veteran ConnectWise consultant, Topher Barrow, how to setup the LabTech ConnectWise integration to automate everything from service board to time entries, through the use of configuration options. If you are looking to take your LabTech to ConnectWise integration to the next level, and save some time and headaches in the process, join this 301 integration setup session.

LEVEL: 301

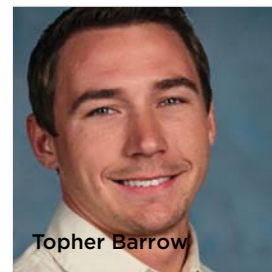
POWERED BY: ConnectWise, ConnectWise Partner

ROLE: Operations, Service Delivery

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 10 5:30 -6:30 PM
(/SESSIONS/STRUCTURING-SERVICE-BOARDS-ALERTING-BEST-PRACTICES/SESSIONDETAIL-10)

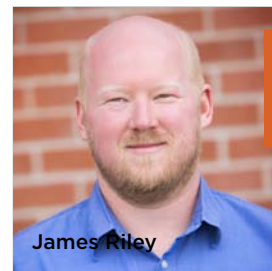
PRESENTED BY:



Topher Barrow
Senior Education Consultant,
ConnectWise

(/speakers/topher-barrow)

PRESENTED BY:



James Riley
Owner, JNR Networks

(/speakers/james-riley)



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to help us grow the business."

Mayron Herrera, President
Synetek Solutions

EXPLORE THE SUITE

(<http://www.connectwise.com/solutions/connectwise-business-suite>)



(/)

[ABOUT \(/ABOUT\)](#) [AGENDA \(/AGENDA\)](#) [BLOG \(/BLOG\)](#) [PHILANTHROPY \(/PHILANTHROPY\)](#)

[NETWORKING \(/NETWORKING\)](#) [SESSIONS \(/SESSIONS\)](#) [SPEAKERS \(/SPEAKERS\)](#)

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Tackling the Five Biggest Problems Plaguing Every MSP

EDUCATION

WHEN & WHERE



Add to
Calendar

DAY 2 Thursday, November 12

ROOM: Florida A

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

Your MSP has problems, but it's not alone. Virtually all MSPs share similar, serious problems--the kind of problems that can kill a MSP virtually overnight. Your MSP's agreements are weak, and you're not sure whether your company is protected. You've done deals on a handshake--and now those deals are starting to blow up. You've failed to provide a service that you promised you would provide--and now your customer (and its lawyer) want to know why. Your employees are banding together to compete against you--can you stop them? Your own customers are hiring your employees--what to do? Any of this sound familiar? Don't fret--solutions are on the way. In this session led by Brad Gross, counsel to dozens of MSPs nationwide, you'll discover the top five issues that plague every MSP, and cost effective measures that will help save your business and secure your company's future.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 6 10:00 -11:00 AM
(/SESSIONS/TACKLING-THE-FIVE-BIGGEST-PROBLEMS-PLAGUING-EVERY-MSP/SESSIONDETAIL-6)

PRESENTED BY:



Bradley Gross

Founding Partner, Law
Office of Bradley Gross, P.A.

(/speakers/bradley-gross)



Harness the Power of Collective Threat Intelligence

See how our Global Site Manager and MSP Partner Program empower MSPs, lower costs, and boost profitability!

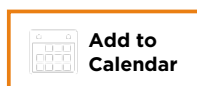
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Technical Process Development: Building Consistent Customer Experience

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Bayhill 19

ROUND 8 2:45 -3:45 PM

SESSION DETAILS

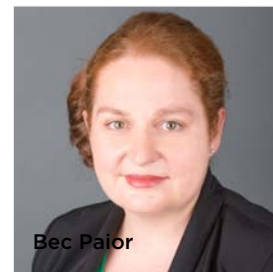
Do you have great teams of individuals who genuinely care about the end user but the customer experience with your people isn't always consistent? Have you written the process and procedure but your team claims no one knows where it is or worse are choosing not to follow it?! Sharing lessons learned from her work with one of South Australia's leading MSPs, Geek Pty Ltd, Bec Paior will show you how to engage and empower your team to deliver a consistent, high quality customer experience. Using tools within ConnectWise, Geek Pty Ltd successfully built a culture of internal process development and after this session, you can too.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise Partner

ROLE: Owner/Executive

PRESENTED BY:



Bec Paior

Drummer, ConnectITLOUD

(/speakers/bec-paior)



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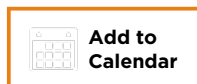
(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

Enabling the Agile MSP

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Bayhill 21

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

Studies show leveraging agile methodology directly leads to increased productivity, higher quality outcomes, increased business stakeholder satisfaction, and reduced cost of implementing solutions. The tenants of agile not only apply to software development but also can be leveraged in IT Managed Services, infrastructure/endpoint support, deployment projects, and general business practices. Join long time ConnectWise partners, Liberty Technology, as they share how they have implemented the best and most appropriate aspects of agile software development into their day-to-day.

Attendees will leave the session with the following practical examples of how to leverage agile methodologies in their practices:

- Implementing Kanban on Service Boards and Projects
- Hosting Daily Standup meetings
- Using real-time communication tools to increase project visibility within the team and customer engagement
- Working in time bound cycles

LEVEL: 101, 201

POWERED BY: ConnectWise Partner

ROLE: Operations, Owner/Executive, Service Delivery

PRESENTED BY:



CEO, Liberty Technology

(/speakers
/ben-johnson)

PRESENTED BY:



COO, Liberty Technology

(/speakers/nathan-jones)



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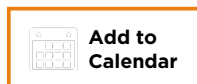
LEARN MORE

(<http://www.veeam.com/service-providers.html>)

The Clean Sheet Business Plan – Part 1 of 5: Strategy

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Orlando N

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

A Special Five Breakout Series: How Top Performing Solution Providers Plan and Run Their Business (Attend one session, a few or all five!)

Part 1 of 5 – Strategy

All top performing Solution Providers sat down at their start – or at some pivotal point later – and devised their foundational strategy: How much value am I trying to create, and in what time? To attain that value, how many customers of what profile must I win, and what exactly will I sell them? How does that drive the choice of vendors I will partner with for my tools and my technology stack? Join Paul Dippell, CEO of Service Leadership, Inc. for this insightful and actionable look at how the top performers make their decisions on these critical factors, and how their approach pays off in growth, service quality and profitability.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive, Operations

PRESENTED BY:



CEO, Service Leadership, Inc.

(/speakers/paul-dippell)



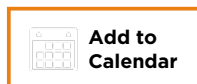
Simplifying the as-a-Service Model

- ✓ Standardize
- ✓ No Risk
- ✓ Positive Cash Flow
- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

(<http://www.greatamerica.com/haar/>)

The Clean Sheet Business Plan – Part 2 of 5: Finance EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 5

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

A Special Five Breakout Series: How Top Performing Solution Providers Plan and Run Their Business (Attend one session, a few or all five!)

Part 2 of 5 – Finance

Like many Solution Providers, Paul Dippell of Service Leadership, Inc. got into the business because he liked to help people with technology, and was good at it. He didn't have much financial acumen but was unaware he needed it. You made money because you charged people when you helped them. Turned out to be not quite so simple, so he set about understanding how to properly configure the financial settings in his company to make a fair return on the value he provided. Join Paul for this informative look into the surprisingly tangible topic of proper financial configuration of a Solution Provider business, and come away with action steps you can use to improve your return and safety margin today.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive, Finance

PRESENTED BY:



Paul Dippell
CEO, Service Leadership, Inc.

(/speakers/paul-dippell)



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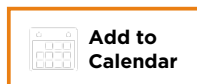


EXPLORE THE SUITE

(<http://www.connectwise.com/solutions/connectwise-business-suite>)

The Clean Sheet Business Plan – Part 3 of 5: Sales EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Orlando N

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

A Special Five Breakout Series: How Top Performing Solution Providers Plan and Run Their Business (Attend one session, a few or all five!)

Part 3 of 5 – Sales

Yes, in top performing Solution Providers, excellent service drives sales. But selling comes before you can deliver service to a new customer, and so it comes before service in this series. Most Solution Providers owners can close most of the calls they go on. But most struggle to scale that model up. How do the top performing Solution Providers keep what's best about the principal-led selling model yet get it to scale? Join Paul Dippell of Service Leadership, Inc. for this jam-packed 1-hour session on how the top performing Solution Providers grow from \$1mm to \$5mm to \$15mm to \$100mm and beyond, leveraging the principal-led selling model to its logical and most effective end. Come away with practical steps you can take to increase your selling leverage whether you have no Sales Reps, a handful, or a dozen of them.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive, Sales

PRESENTED BY:



CEO, Service Leadership, Inc.

(/speakers/paul-dippell)



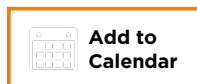
(<https://www.chartec.net>)

Start closing more deals, gaining new leads
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Ready, Set, **GO!**

The Clean Sheet Business Plan – Part 4 of 5: Service EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Orlando L
ROUND 8 2:45 -3:45 PM

SESSION DETAILS

A Special Five Breakout Series: How Top Performing Solution Providers Plan and Run Their Business (Attend one session, a few or all five!)

Part 4 of 5 – Service

Excellent service comes from excellent service people, right? How easy is it to find excellent service people? When you can find them, what do they cost? The top performing Solution Providers also strive to find great people but they don't count on it. Instead, they build their operation so decent but lower cost technical people deliver above average service performance and customer satisfaction. Join Paul Dippell of Service Leadership, Inc. for this engaging session on the checklist of steps that the top performing Solution Providers use to construct a service operation that delivers above average quality with below average investment, and understand how to apply them today to your shop.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive, Service Delivery

PRESENTED BY:



CEO, Service Leadership, Inc.

(/speakers/paul-dippell)



Simplifying the as-a-Service Model

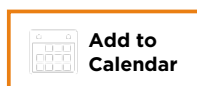
- ✓ Standardize
- ✓ No Risk
- ✓ Positive Cash Flow
- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

(<http://www.greatamerica.com/haar/>)

The Clean Sheet Business Plan – Part 5 of 5: Compensation

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Orlando N

ROUND 9 4:00 -5:00 PM

SESSION DETAILS

A Special Five Breakout Series: How Top Performing Solution Providers Plan and Run Their Business (Attend one session, a few or all five!)

Part 5 of 5 – Compensation

Owners and executives of top performing Solution Providers know that the behavior of employees and managers is most likely to produce financial safety and success for the company, when their incentive plans are meaningfully tied to company performance. Lower performing Solution Providers either don't use much incentive compensation, or they construct it such that it's either not motivational to the people or not affordable for the company, or both. Join Paul Dippell of Service Leadership, Inc. for this demystifying look at how top performing Solution Providers use simple compensation drivers at all levels to align their people's behavior with shareholder goals to deliver happy customers and happy profits with happy employees.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive

PRESENTED BY:



CEO, Service Leadership, Inc.

(/speakers/paul-dippell)




**Harness the Power of
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See how our Global Site Manager and MSP Partner Program empower MSPs, lower costs, and boost profitability!



(<http://webroot.com/partners>)

The Commoditization Life Raft

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Bayhill 19
ROUND 5 4:30 -5:30 PM

SESSION DETAILS

The MSP market is maturing. All IT providers have access to the same tools and technology. You are competing against a lot of “me-too” providers. Prospects have trouble seeing a difference in value so price becomes a deciding factor. What if you could command higher prices and eliminate price as an objection? Top MSPs are commanding monthly fees that are 20%-40% higher than average providers. During this session, Gary Pica will show you how to create a true competitive advantage.

You will learn:

- How to clearly separate your value proposition from others
- How to increase your price while selling more recurring revenue
- Getting up the value stack!

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive, Operations

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 6 10:00 -11:00 AM
(/SESSIONS/THE-COMMODITIZATION-LIFE-RAFT
/SESSIONDETAIL-6)

PRESENTED BY:



Gary Pica

CEO, TruMethods

(/speakers/gary-pica)



- | | |
|----------------------|-------------------------------|
| ✓ Standardize | ✓ Cloud-like Financial Model |
| ✓ No Risk | ✓ Boost MRR |
| ✓ Positive Cash Flow | ✓ Increase Business Valuation |

The Current Threat Landscape - Panel

PANEL

WHEN & WHERE



Add to
Calendar

DAY 2 Thursday, November 12

ROOM: Bayhill 17

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

Security is a key component of any healthy, revenue-generating managed service offering. Service providers are experiencing unprecedented growth of all kinds of threat variants. Social engineering alone is evolving faster than your customers' ability to learn & adapt to tactics. We will evaluate industry trends and discuss specific examples of malicious software threatening your clients. A panel of industry experts will be assembled to answer targeted questions about these threats and help educate based on proven best practice.

LEVEL: 301

POWERED BY: Thought Leaders

ROLE: Operations, Owner/Executive, Service Delivery

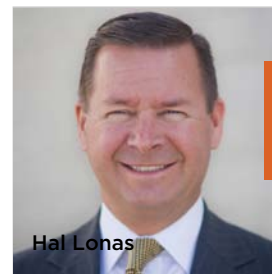
PRESENTED BY:



Justin Ryhal

Senior Solution Strategist,
ConnectWise

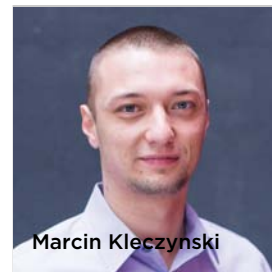
(/speakers/justin-ryhal)
PRESENTED BY:



Hal Lonas

Chief Technology Officer,
Webroot

(/speakers/hal-lonas)
PRESENTED BY:



Marcin Kleczynski

Chief Executive Officer,
Malwarebytes

(/speakers/marcin-
kleczynski)
PRESENTED BY:





(/)

[ABOUT \(/ABOUT\)](#) [AGENDA \(/AGENDA\)](#) [BLOG \(/BLOG\)](#) [PHILANTHROPY \(/PHILANTHROPY\)](#)

[NETWORKING \(/NETWORKING\)](#) [SESSIONS \(/SESSIONS\)](#) [SPEAKERS \(/SPEAKERS\)](#)

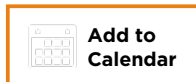
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The Dropbox Users Love, With The Control That IT Needs

Sponsored By: Dropbox

VENDOR

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Celebration 7

ROUND 7 11:15 -12:15 PM

SESSION DETAILS

Come learn about the productivity tool loved by more than 400 millions users! In this session, we will showcase the Dropbox Business product and discuss how it impacts the way companies work today. Also, selected Dropbox partners will share best practices on pitching new customers and upgrading existing clients to Dropbox Business. Finally, we will review key elements of the Dropbox Partner Program and ways you can build a successful business around Dropbox Business.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



Dropbox
for Business

(/sponsors/dropbox)

PRESENTED BY:



Matt Pahnke

Global Channel Marketing
Lead, Dropbox

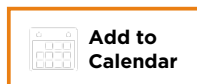
(/speakers/matt-pahnke)



The Missing Piece of the Puzzle: Configurations

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Florida C

ROUND 9 4:00 -5:00 PM

SESSION DETAILS

The all-powerful ConnectWise configuration...the final piece of the puzzle that can turn ConnectWise into the 'brain' of your organization. Customizable configurations allow you to store and categorize a plethora of information about your clients. This session will introduce you to the world of configurations, showing you how to account for and classify assets, track serial numbers, components and even people. Learn best practice around configuration input to make for easy reporting. Finally, become familiar with configuration workflows that allow you to automate notifications of license expirations, turning ConnectWise into a sales engine. Leave with a solid understanding of the role configurations play in ConnectWise and a game plan for incorporating them into your processes.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Service Delivery

PRESENTED BY:



Matthew Maiorano

Business Consultant,
ConnectWise

(/speakers/matthew-
maiorano)



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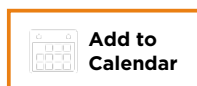
LEARN MORE

(<http://www.veeam.com/service-providers.html>)

The New Face of Cloud Computing

PANEL

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Bayhill 17

ROUND 8 2:45 -3:45 PM

SESSION DETAILS

As the demand for cloud computing increases, the solution provider community is actively choosing vendor partners who empower taking full advantage of this ongoing trend. With resources to penetrate the cloud market at a rapid pace and with unparalleled scale, both the vendor and partner community are having an “aha” moment when it comes to distribution being a true cloud computing player. Solution Providers are partnering with top tier vendors to sell and deploy cloud offerings and vendors are working with distribution to support and manage this systems-intensive technology movement. Join us for an interactive discussion with the best of the best vendors and distributors as well as some early adopter partners creating the new face of the channel's cloud computing ecosystem.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Operations, Owner/Executive

PRESENTED BY:



CEO, Global Technology
Distribution Council

(/speakers/tim-curran)



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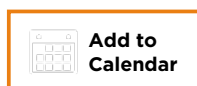
(<http://www.youtube.com>

/user/labtechsoftware?feature=watch)

The Riches are in the Niches: How to Double Your Income by Narrowing Your Market

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Bayhill 23

ROUND 8 2:45 -3:45 PM

SESSION DETAILS

The fastest way to position yourself for massive growth is to do exactly what you may think you shouldn't do-narrow your market. At first glance, many small business owners worry niching will limit their opportunities, but in actuality, niching makes doubling your income easier than ever. In this talk you'll learn how to put the power of time and money on your side with the same practical techniques Stephanie used to double her own income in less than 12 months.

Key Takeaways:

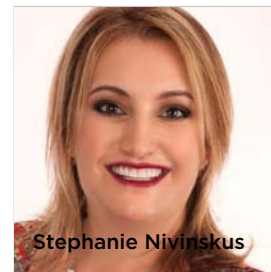
- Why those who niche can charge so much more-and get it
- How to identify your niche and communicate it to your audience
- How niching immediately positions you as the go-to expert in your industry

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive, Marketing

PRESENTED BY:



Stephanie Nivinskus

President, SizzleForce Marketing

(/speakers/stephanie-nivinskus)



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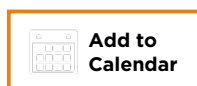
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(<http://webroot.com/partners>)

The Southwest Effect - Successful Practices of a Market Leader

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 9

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

Southwest Airlines has given the business world a textbook example that providing fabulous customer service and maintaining high employee morale in a low-cost environment is possible – and indeed profitable in Corporate America today. But what's the real story? As a key developer of Southwest Airlines' legendary positively outrageous customer service and leadership training programs, Jason Young knows that great culture does not "just happen." A customer service initiative can be created and nurtured to flourish into a customer service culture. Beyond the headlines and the hype, Jason shares the real inside story behind the success of the company consistently rated No. 1 in customer service and employee satisfaction. Best of all, you'll learn how you can take these proven organizational principles to your team or company. You won't want to miss this inside edition from the man who knows it best.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive

PRESENTED BY:



Jason Young

President, LeadSmart, Inc.

(/speakers/jason-young)



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Mayron Herrera, President
Synetek Solutions

EXPLORE THE SUITE

(<http://www.connectwise.com/solutions/connectwise-business-suite>)

The State of High Availability and Disaster Recovery EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13
ROOM: Bayhill 17
ROUND 9 4:00 -5:00 PM

SESSION DETAILS

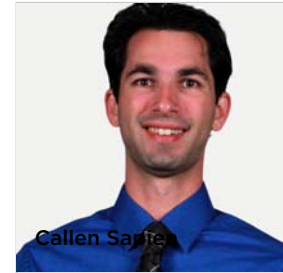
Having a disaster recovery plan and access to high availability options is vital in a growing cloud and always on environment. In this fluid atmosphere our customers have to be online and in the marketplace, 24/7. Service providers must offer a plan and solutions to keep their customers connected. Additionally, customers are dealing with disaster scenarios every day. Be it a human threat or a natural disaster, if we cannot persuade customers to buy the insurance offered by high availability and disaster plans solutions, then service providers will get the blame. Our panel will discuss and answer pointed questions related to the changing high availability and disaster recovery landscape as well as give insight on how to position these solutions to maintain healthy profit margins while keeping customers happy.

LEVEL: 301, 201

POWERED BY: ConnectWise

ROLE: Owner/Executive, Service Delivery, Operations

PRESENTED BY:



Callen Sapient
Solution Strategist,
ConnectWise

(/speakers/callen-sapient)

PRESENTED BY:



Doug Hazelman
Vice President, Product
Strategy, and Chief
Evangelist, Veeam

(/speakers/doug-hazelman)

PRESENTED BY:



Lee Bender
Senior Director of Product
Strategy, StorageCraft

(/speakers/lee-bender)

PRESENTED BY:



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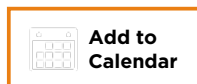
[NETWORKING \(/NETWORKING\)](#) [SESSIONS \(/SESSIONS\)](#) [SPEAKERS \(/SPEAKERS\)](#)

[SPONSORS \(/SPONSORS\)](#)

The Straight Truth about Growth

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Celebration 7

ROUND 8 2:45 -3:45 PM

SESSION DETAILS

Many businesses talk about wanting to grow their companies, but the statistics are staggering that most never achieve their desired growth. In his over 30 years of IT industry experience running a growth company and consulting for hundreds of organizations, Arlin Sorenson, founder of Heartland Technology Group, will share the 10 keys that have to be in place to truly grow. Growth isn't rocket science, but it also isn't accidental. Come learn about the intentional steps it takes to grow your company to the next level.

LEVEL: 101, 201, 301

POWERED BY: HTG

ROLE: Owner/Executive

PRESENTED BY:



Founder and CEO, HTG Peer Groups and Heartland Leadership Group

(/speakers/arlin-sorenson)



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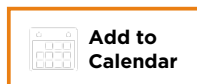
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The Top Procurement Questions Answered!

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Bayhill 21

ROUND 10 5:30 -6:30 PM

SESSION DETAILS

Whether you're just starting with Procurement, or a long time user, you probably have questions. Have you ever wondered how to account for freight, returned items, or internal purchasing? Have you ever wanted to utilize a barcode scanner? In this session, the answers and solutions to these questions will be discussed. We will also cover ordering inventory products, procurement notifications, tracking price and costing of individual products, and more! If you are new to procurement, or just interested in seeing what it is all about - you should also check out the Intro to Procurement Lab!

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Operations

PRESENTED BY:



Jennifer Six
Education Consultant,
ConnectWise

(/speakers/jennifer-six)



Simplifying the *as-a-Service* Model

- ✓ Standardize
- ✓ No Risk
- ✓ Positive Cash Flow
- ✓ Cloud-like Financial Model
- ✓ Boost MRR
- ✓ Increase Business Valuation

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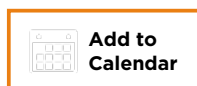


(<http://www.facebook.com>)

Transform your Help Desk with ChatAssist

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 5

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

In today's fast-paced world, people want answers and they want them now. When you implement ChatAssist in your organization, not only will you be making your customers happier by being a click away but you'll also be improving your response times as you will be able to chat to resolve issues quickly and efficiently. Best of all? ChatAssist integrates seamlessly into ConnectWise! That means all chat communications and time will live in ConnectWise, allowing you to invoice clients based on these chat sessions. We will discuss the ease of using ChatAssist and give you tips to migrate from a traditional helpdesk to a chat centric helpdesk.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Service Delivery, Operations

PRESENTED BY:



Craig Fulton

General Manager of Dyno,
ConnectWise Business Suite

(/speakers/craig-fulton)



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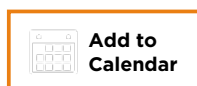
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Turn Your Employees into Raving Fans: How to Keep Colleagues Engaged and Happy

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Florida B

ROUND 1 10:00 -11:00 AM

SESSION DETAILS

Fact: employees who are highly engaged are more productive, healthier, stay longer, and serve clients better. So, how do you get them there? In this session, we'll outline ten employee engagement tactics to help you create a better company culture and manage mutual expectations. You'll learn what key performance metrics you should be measuring, and how to better ensure accountability between you and your employees. Attendees will walk away from this sessions with practical and actionable solutions to your biggest barriers to happy employees.

LEVEL: 101, 201, 301

POWERED BY: ConnectWise Partner

ROLE: Human Resources

PRESENTED BY:



Eric Dykes
CEO, United Technology Group

[\(/speakers/eric-dykes\)](#)



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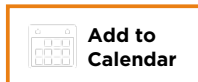
[/user/labtechsoftware?feature=watch](#)

Upside Down Accounting - The Cloud Accounting Revolution

Sponsored By: Wise-Sync

VENDOR

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Bayhill 21

ROUND 7 11:15 -12:15 PM

SESSION DETAILS

Cloud Accounting provides the flexibility of 'Anywhere' access, and features like direct bank feeds deliver real-time financials for better cash-flow management.

If you're struggling with managing tax affairs, or juggling the 'Cash-Gap' then this session is for you.

Session Highlights

- Is your accounting system hampering growth?
- Do you lose sight of your financials in-between months?
- Do you have 'silos of chaos' and a lack of visibility into your financial performance?

Come and hear how Cloud Accounting can deliver lasting change to your business.

LEVEL: 101, 201, 301

POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/wise-sync)

PRESENTED BY:



Paul MacNeill

Founder & Finance
Consultant, Wise-Sync

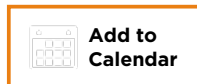
(/speakers/paul-macneill)



Using ConnectWise for Compensation Plans

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Orlando M

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

Clear compensation plans are key in keeping your sales team motivated, and ConnectWise can help you manage and report off of performance. Oftentimes, compensation plans can become entirely too complex, causing confusion and demotivation amongst the team. Attend this session to learn how ConnectWise can help you simply track commissions off of Product, Agreement and Service Sales. And, if you commission based on Activities, we'll also discuss how to track different types of activities, and report off of those values. Leave this session knowing how to structure your ConnectWise Commission set-up, and what reports to run.

LEVEL: 101

POWERED BY: ConnectWise

ROLE: Sales

PRESENTED BY:

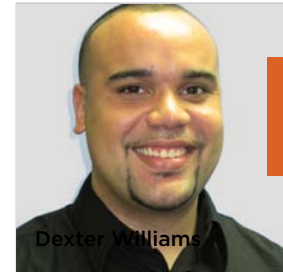


Jennifer Six

Education Consultant,
ConnectWise

(/speakers/jennifer-six)

PRESENTED BY:



Dexter Williams

Strategic Markets Manager,
ConnectWise

(/speakers/dexter-
williams)




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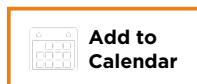
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Very Important Service for Very Important Clients

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Florida B

ROUND 6 10:00 -11:00 AM

SESSION DETAILS

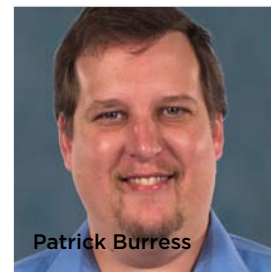
Very important clients expect white glove service. Their experience with your company is critical in creating raving fans amongst your client base. Join this session to you determine your VIP client process. You'll learn to leverage the power of ConnectWise to identify VIPs and automate their excellent customer service. Use SLAs, Customer Status and more to ensure VIPs experience consistent, outstanding service from onboarding to ticketing

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Service Delivery, Owner/Executive

PRESENTED BY:



Patrick Burress

Business Consultant,
ConnectWise

(/speakers/patrick-burress)



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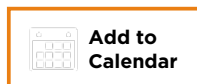


(<http://www.youtube.com>

Weapons Grade CEO Secrets

EDUCATION

WHEN & WHERE



DAY 2 Thursday, November 12

ROOM: Celebration 5

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

So, you have years building a client base, a good sized team to deliver on your promises and your books say you have done a good job so far. Congrats. You chose to pursue a growth strategy and consciously stepped away from a lifestyle business. You are removing as many hats as possible to pursue being a true CEO – vision and strategy are your focus now. BIG DAY. Congrats again.

Now what?

Ted will share what he did from his BIG DAY up until now, including instating a strong Leadership Team, building a growth strategy, a change oriented culture and a multiyear shift from being Product Oriented to Service Oriented... all of which ended up being what attracted a successful Acquisition. #Weapons Grade

LEVEL: 101, 201, 301

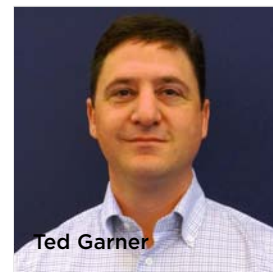
POWERED BY: ConnectWise Partner

ROLE: Owner/Executive, Operations

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 6 10:00 -11:00 AM
(/SESSIONS/WEAPONS-GRADE-CEO-SECRETS
/SESSIONDETAIL-6)

PRESENTED BY:



Ted Garner

CEO, IT Weapons

(/speakers/ted-garner)



"The ConnectWise® Business Suite™
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to help us grow the business."

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We've Got a Problem. Actually, a Crisis. What Do We Do?

EDUCATION

WHEN & WHERE



Add to
Calendar

DAY 3 Friday, November 13

ROOM: Florida B

ROUND 8 2:45 -3:45 PM

SESSION DETAILS

Two years ago, before a standing room-only crowd, attorney Brad Gross explored different crises that affect the business of every attendee at IT Nation. Data loss, privacy breaches, supply shortages, employee problems--we covered them all. (And so, the legend of the "Oh Sh#t Moment" was born...) Now, in a 2015 reboot of that presentation, Brad Gross revisits the serious crises that still threaten every MSP, and explains what steps your company must take to minimize disruption and avoid company-shattering costs and liability. Learn what it takes to roll with the punches, and how to throw a few of your own, while creating a crisis management plan that your company can rely upon to manage and resolve crises.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive

PRESENTED BY:



Bradley Gross

Founding Partner, Law
Office of Bradley Gross, P.A.

(/speakers/bradley-
gross)



"The ConnectWise® Business Suite™
streamlines business processes
—everything from sales to billing and ticketing—
to help us grow the business."

Mayron Herrera, President
Synetek Solutions



ConnectWise®
Business Suite™

EXPLORE THE SUITE

(<http://www.connectwise.com/solutions/connectwise-business-suite>)

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What Was I Looking For When Entering Into My Merger/Acquisition?

PANEL

WHEN & WHERE



Add to
Calendar

DAY 2 Thursday, November 12

ROOM: Bayhill 17

ROUND 5 4:30 -5:30 PM

SESSION DETAILS

Navigating the world of mergers and acquisitions can be tricky. When it comes down to it, sometimes you don't know what you don't know. Join this session to talk with partners who have successfully merged, acquired or been acquired. Take a trip back in time to understand what they were looking for, why they made the decisions they made, and what they would change today.

LEVEL: 101, 201, 301

POWERED BY: Thought Leaders

ROLE: Owner/Executive



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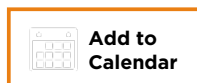
/user/labtechsoftware?feature=watch)

Why Choose StorageCraft as Your Disaster Recovery Solution

Sponsored By: StorageCraft

VENDOR

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Bayhill 23

ROUND 7 11:15 -12:15 PM

SESSION DETAILS

Never is your performance as important as when your clients experience a disaster. Getting them back online fast is a make or break for both you and your clients. Learn what makes the StorageCraft Recovery Solution so reliable, flexible and profitable for MSPs. See the StorageCraft and ConnectWise integration and learn how you can respond to disasters of any type in a fashion that makes you shine and wins your clients' loyalty for life.

LEVEL: 101, 201, 301

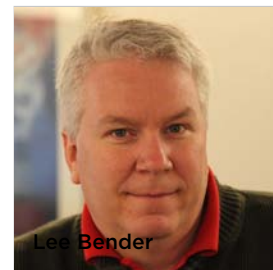
POWERED BY: Vendor Sponsor

SPONSORED BY:



(/sponsors/storagecraft)

PRESENTED BY:



Senior Director of Product Strategy, StorageCraft

(/speakers/lee-bender)



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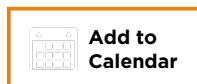
/ConnectWise/

(<http://www.youtube.com>)

Workflow Rules Lab

HANDS-ON LAB

WHEN & WHERE



DAY 2 Thursday, November 12
ROOM: Celebration 3
ROUND 3 - ROUND 4 1:45 - 4:00 PM

SESSION DETAILS

Once you have the proper processes in place, you can leverage the power of Workflow Rules to automate your business and save time, money and reduce human error. YAY! Attend this hands-on lab to learn everything you need to know about automation in ConnectWise, including won opportunities, expiring configurations, survey scores and more! Become a Workflow master and take your automation to the next level!

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Service Delivery, Operations

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 6 - ROUND 7 10:00 - 12:15 PM
(/SESSIONS/WORKFLOW-RULES-LAB/SESSIONDETAIL-6-7)

PRESENTED BY:

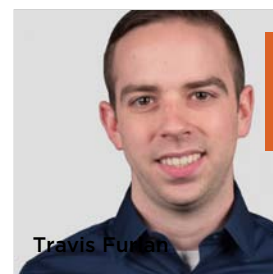


Neil Perkins

Business Consultant,
ConnectWise

(/speakers/neil-perkins)

PRESENTED BY:



Travis Furlan

Partner Support Consultant,
ConnectWise

(/speakers/travis-furlan)



(<http://www.efolder.net>)

WOW! Automation Through Workflow Rules That Impact Your Sales Cycle

EDUCATION

WHEN & WHERE



Add to
Calendar

DAY 2 Thursday, November 12

ROOM: Celebration 7

ROUND 3 1:45 -2:45 PM

SESSION DETAILS

We all want to “Paint Tomorrow Green” but with Workflow Rules, you’ll be Painting Tomorrow Gold. Sales processes are important to define and even more important to follow. When you’re able to standardize these processes through automation, you’ll be freeing up valuable time to work on more deals than before! In this session we will discuss the following sales Workflow Rules to help:

- Monitor requests from customers
- Track lost deals to revisit
- Streamline your sales handoff process

If you’re new to Workflow Rules be sure to check out the Workflow Rule Lab!

LEVEL: 301

POWERED BY: ConnectWise

ROLE: Sales, Operations

ALSO AVAILABLE:

DAY 3 Friday, November 13 ROUND 9 4:00 -5:00 PM

(/SESSIONS/WOW-AUTOMATION-THROUGH-WORKFLOW-RULES-THAT-IMPACT-YOUR-SALES-CYCLE/SESSIONDETAIL-9)

PRESENTED BY:

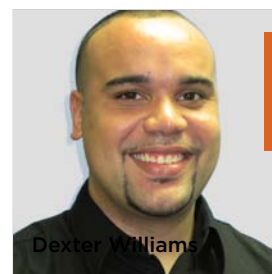


Mitchell Rollo

Education Consultant,
ConnectWise

(/speakers/mitchell-rollo)

PRESENTED BY:



Dexter Williams

Strategic Markets Manager,
ConnectWise

(/speakers/dexter-williams)



“The ConnectWise® Business Suite™
streamlines business processes
—everything from sales to billing and ticketing—
to help us grow the business”



ConnectWise®
Business Suite™

Yes Day! Building a Customer Service Team to Retain Clients

EDUCATION

WHEN & WHERE



Add to
Calendar

DAY 2 Thursday, November 12

ROOM: Orlando L

ROUND 4 3:00 -4:00 PM

SESSION DETAILS

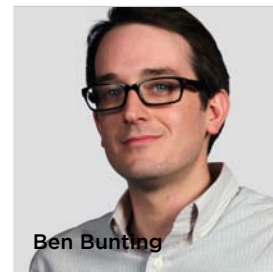
Make commitments to stop saying NO to your customers. Holding an event like 'Yes Day' can help your team come up with creative ways to achieve stellar results. Join Ben Bunting, Manager of Customer Service at ConnectWise, as he discusses how to build a Customer Service team. He will detail what guidelines need to be set to ensure consistently exceptional service, and how this in turn, will help you retain your existing clients. Ben will discuss successful techniques he's used such as Core Value cards, intended to compliment a colleague when they're excelling in a key area that you determine. Say YES and attend the session – leave with easily implemented ideas to return the yes mentality to your organization!

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Operations, Service Delivery

PRESENTED BY:



Ben Bunting

Customer Service Manager,
ConnectWise

(/speakers
/ben-bunting)



(<https://www.chartec.net>)

Start closing more deals, gaining new leads
and transforming your business.
Get Started with this E-Book.

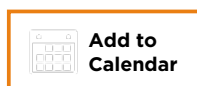
Ready, Set, **GO!**



Your Interface, Your Experience: Making ConnectWise UI Work for You

EDUCATION

WHEN & WHERE



DAY 3 Friday, November 13

ROOM: Celebration 12

ROUND 10 5:30 -6:30 PM

SESSION DETAILS

The ConnectWise application is rapidly being updated to enhance the user experience. Enhancements including Custom Fields, Movable Pods and the Top Navigation bar are just some of the new, cool features. This session is sure to provide you with tips & tricks to help you customize your ConnectWise instance, making it more user-friendly and more brain-friendly. In addition to User Interface updates, this session will also dive into other cool features like ConnectWise Labs, and Partner Kits! Don't miss out!

LEVEL: 101, 201, 301

POWERED BY: ConnectWise

ROLE: Finance, Human Resources, Marketing, Operations, Owner/Executive, Sales, Service Delivery

PRESENTED BY:



April Taylor

Senior Product Manager,
ConnectWise

[\(/speakers/april-taylor\)](#)



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