

# sage Partner Summit

## Perform at your best

Breakout sessions on the topics you care about most.

### Sage Intacct

- [Technical](#)
- [Implementation services](#)
- [Sales](#)
- [Marketing](#)
- [Advanced sales and marketing](#)
- [Sage Intacct Accountant Program Partners](#)

### Sage X3

- [Product](#)
- [Technical](#)
- [Enablement and Marketing](#)

### Sage People

- [View track](#)

### Sponsor Sessions

- [Sage Intacct](#)
- [Sage X3](#)

## Technical track

For partners with staff already in, or wanting to move into, a developer/technical role at their partner. This track is meant to touch on all areas related to such a role. This track is for those experienced with Sage Intacct. This track will involve web technologies and light programming.

Audience: Software Developers or Business Analysts

| Title  | Abstract   |
|--|--|
| <b>Tuesday, 3 March</b>  |  |
| 10:30 AM - 11:30 PM<br><br>Become the Ruth/Brady/Jordan/Gretzky of Scope<br>INIM05<br>CPE Credits: 1 | This session will be dedicated to the possibility that organizations that get great at developing scope documents create greater success for their customers. Creating a truly great scope document is not easy as it requires more energy to be expended earlier in the implementation than is usual. If you think you have the capability to sharpen your scoping skills, you are invited to participate in this gather about how best to create a scope document.   |
| 1:30 PM - 2:30 PM<br><br>Sage Intacct Technical Essentials<br>INTE02<br>CPE Credits: 1               | Learn the fundamentals of identifying Intacct services/capabilities so you can make informed decisions about solutions based on your business requirements. Get an understanding of the API, Web Services, Platform Services, DDS, and Customization Services. This presentation will break down each and dive into examples of different technical solutions. Requirements: Sage Intacct implementation experience and intermediate understanding of Sage Intacct application and its modules.  |
| 2:45 PM - 3:45 PM<br><br>Next Level Custom Documents<br>INTE03<br>CPE Credits: 1                     | Take your clients' Custom Documents to the next level by utilizing the Application Programming Interface (API) with components of Customization or Platform Services. This session dives into technical examples of different custom documents and how each solution was built. Requirements: Must have prior experience with Sage Intacct Custom Documents, Microsoft Word merge fields, and technical ability to learn and understand XML.   |
| 4:45 PM - 5:45 PM<br><br>Page Scripting in Platform Services<br>INTE04<br>CPE Credits: 1             | Learn how to develop, debug, and support your own page scripts in Platform Services. This session will walk through different examples utilizing many parts of the Sage Intacct platform. This is a technical programming course. Requirements: Sage Intacct implementation experience and intermediate understanding of Sage Intacct application and its modules. Comfortable working with the API and Platform Services is highly encouraged. Must have ability to learn and understand the following web programming languages: JavaScript, HTML, CSS, and XML. |

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Wednesday, 4 March

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9:30 AM - 10:30 AM

11:30 AM – 12:30 PM

Develop an Application with  
Platform Services

INTE05

CPE Credits: 2

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This session will jump into the deep end of the Sage Intacct solution learning how to develop an application with Platform Services. This session will walk through building a sample application. Requirements: Sage Intacct implementation experience and intermediate understanding of Sage Intacct application and its modules. Must have ability to learn and understand the following web programming languages: JavaScript, HTML, CSS, and XML.

## Implementation services track

New to the Sage Intacct family and just starting your next implementation? Have new implementation staff and want to get them started down the right path? Attend this track and learn best practices around project management in the SaaS world, implementation recommendations and challenges, and planning techniques used for successful implementations that result in referrals.

Audience: Sage Intacct Implementation Consultants and Solution Consultants

| Title   | Abstract   |
|---|--|
| <b>Monday, 2 March</b>  |  |
| 1:00 PM – 3:15 PM<br>4:15 PM – 6:15 PM<br><br>Implementation Bootcamp<br>INIM01<br>CPE Credits: 4         | Hear how top partners tackle their Sage Intacct implementations. Take away best practices and methodologies you can use immediately. Hear how your peers have shortened project times, cut costs, evaluated key criteria, and ultimately achieved implementation excellence.   |
| 1:00 PM – 3:15 PM<br><br>Contracts: ACP and Implementation Management<br>INIM02<br>CPE Credits: 2         | Join us for a hands-on session as we take a deep dive into the new Contract historical migration tool, which is streamlining the sales and implementation conversations regarding history. We will end the morning with a partner panel discussing tips on managing Contracts implementations to create efficiencies and client success while reducing risks. Pre-Requisite: Attendance since 2018 in the Implementing and Configuring Contracts.  |
| 4:00 PM – 6:15 PM<br><br>Contracts: Advanced Use Case Solutions (invite only)<br>INIM03<br>CPE Credits: 2 | Do you want to approach new clients with confidence as to the solutions Sage Intacct Contracts can bring them? Join us for a hands-on session working through a typical Contracts and Projects use case. And then following our work together on a SaaS and Service solutions, partners will demonstrate and share solutions that they have found for complicated renewal, usage, cancellations and MEA use cases. Pre-Requisite: Attendance since 2018 in the Implementing and Configuring Contracts. |

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## Tuesday, 3 March

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10:30 AM – 11:30 AM

Become the  
Ruth/Brady/Jordan/Gretzky  
of Scope

INIM05

CPE Credits: 1

This session will be dedicated to the possibility that organizations that get great at developing scope documents create greater success for their customers. Creating a truly great scope document is not easy as it requires more energy to be expended earlier in the implementation than is usual. If you think you have the capability to sharpen your scoping skills, you are invited to participate in this gather about how best to create a scope document.

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1:30 PM – 2:30 PM

Top 10 Most Frustrating  
Implementation Mistakes &  
How To Avoid Them

INIM06

CPE Credits: 1

This session is loaded with practical content to help you successfully complete your Sage Intacct implementation and grow your Sage Intacct implementation knowledge. Learn how to fool proof your implementations leveraging the proven steps for success.

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2:45 PM – 3:45 PM

4:45 PM – 5:45 PM

Innovating at Every Stage  
Services Roundtable

INIM07

CPE Credits: 0

Exchange ideas with your peers on ways to innovate from the first time speaking to a prospect until they are a long-time customer. Sharpen your idea in this roundtable format leaving with a practical list of steps to implement in your business.

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## Wednesday, 4 March

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9:30 AM – 10:30 AM

Take your Customers  
Further Leveraging our  
NPS Program

INIM09

CPE Credits: 1

Better understand our channel Net Promoter program and identify at-risk customers early using our mid-year Sage Intacct review process.

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11:30 AM – 12:30 PM

Case and Escalation  
Management

INIM10

CPE Credits: 1

Ever have a customer issue and you're not sure how to move it forward? Derek Taylor will present the most effective strategies for managing your case requests and how to appropriately escalate if needed.

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Breakout sessions are subject to change and additional sessions may be added.

## Sales track

Are your sales efforts at their best? Do you have a prospecting or account plan that you can effectively execute on and will deliver the desired results? Join these sessions to learn about some of the priorities to focus on as a VAR Partner to help with your sales success. These sessions will cover sales key areas around opportunity and referral tactics, account-based marketing and more.

Audience: Sage Intacct CEOs and sales

| Title   | Abstract   |
|---|--|
| <b>Sunday, 1 March</b>                              |  |
| <b>Pre-conference</b>                               |  |
| <hr/>   |  |
| 3:15 PM – 5:15 PM                                   |  |
| Selling to Win                                      | The sales game changes every day. What worked yesterday may not be working today. This session will provide you with the most current methods to winning the sales cycle. Learn how to tell the new Sage Intacct story, understand the pragmatic buyer, refine the Summary of Findings, perform cutting demos, differentiate from the competition, sell value, and set the stage for a long-term client. |
| INSA01  |  |
| CPE Credits: 2                                      |  |
| <hr/>   |  |
| <b>Monday, 2 March</b>                              |  |
| <hr/>   |  |
| 1:00 PM – 2:00 PM                                   |  |
| Selling the Complete Solution with a Team Approach  | Today's buyer and the competitive marketplace requires you to deploy a team selling approach with Sage Intacct, your own team members and marketplace partners. Hear from a panel of partners who are winning deals with this strategic team selling approach.   |
| INSA02  |  |
| CPE Credits: 1                                      |  |
| <hr/>   |  |
| 2:15 PM – 3:15 PM                                   |  |
| Effective ROI Strategies                            | We'll share simple explanations and easy to use methods that will help you introduce ROI with confidence into all of your active opportunities.  |
| INSA03  |  |
| CPE Credits: 1                                      |  |
| <hr/>   |  |
| 4:00 PM – 5:00 PM                                   |  |
| How to Leverage Marketing Assets in the Sales Cycle | Learn about valuable marketing assets you can incorporate at every stage of the sales cycle. Case studies, videos, customer quotes, analyst reports, slide deck templates, past resources from the partner summit and more.  |
| INSA04  |  |
| CPE Credits: 1                                      |  |
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5:15 PM – 6:15 PM

Close Deals Faster with  
Internal Closing Plans and  
Mutual Plans

INSA05

CPE Credits: 1

What's your plan to win each stage and close the deal? How can you use mutual plans to validate next steps with economic buyers? We will discuss why you need to plan out your sales strategy early, how to do that and how to use a mutual plan with the prospect to keep the deal moving through the stages to closure.

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Tuesday, 3 March

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10:30 AM – 11:30 PM

Marketing and Sales  
Metrics

INSA06

CPE Credits: 1

Understanding your coverage model and waterfall will keep your marketing and sales team on track. Learn how Sage Intacct and top partners measure and forecast success.

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1:30 PM – 2:30 PM

Add Deals to your Pipeline  
using the Sage Intacct  
Marketing Stack

INSA07

CPE Credits: 1

Learn how the Sage Intacct marketing stack is helping partner salespeople identify hot leads that are quickly converting into qualified opportunities.

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2:45 PM – 3:45 PM

Building Your Value  
Strategy - Effective  
Techniques for Holding the  
Line on Discounting

INSA08

CPE Credits: 1

Don't let discounts destroy your margin, revenue goals and commission checks. Learn how to effectively communicate the Sage Intacct value proposition during the deal process to WIN.

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4:45 PM – 5:45 PM

Sage Intacct Competitive  
Session: All You Need to  
Know to Win against the  
Competition

INSA09

CPE Credits: 1

Sage Intacct shares the last information and strategy to help you win against the competition. Execute from a position of strength against the competition in your sales cycle.

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Wednesday, 4 March

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9:30 AM – 10:30 AM

Channel Chat: Best Practices in Sales

INSA10

CPE Credits: 0

From standard best sales practices to the role of social media in sales, join us for a robust discussion to learn from your peers how to increase success in 2020

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11:30 AM – 12:30 PM

Own your Own Success

INSA11

CPE Credits: 1

Be in control of your own pipeline by owning your own personal referral and networking plan. You will see immediate results.

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Breakout sessions are subject to change and additional sessions may be added.



## Marketing track

Are your marketing efforts at their best? Do you have a marketing plan and calendar that you can effectively execute and will deliver the desired results? Join these sessions to learn about some of the priorities to focus on as a VAR Partner to help with your marketing success. These sessions will cover marketing key areas around Nurture and Campaign marketing, Social, Website and Customer content and more.

Audience: Sage Intacct CEOs, sales, and marketing

| Title  | Abstract   |
|--|--|
| <b>Monday, 2 March</b>   |  |
| <b>1:00 PM – 2:00 PM</b>   |  |
| The Referral Marketing Survival Guide<br>INMK08<br>CPE Credits: 1  | There's a reason it's the number one opportunity creator year after year after year. While referral marketing requires a time investment, it's a strategy that any sized partner can execute. Hear from partners on how they prioritize their referral efforts to yield opportunities.   |
| <b>2:15 PM – 3:15 PM</b>   |  |
| How to Leverage Sage Intacct Marketing Technologies and Resources to drive your campaign success<br>INMK02<br>CPE Credits: 1 | Are you taking advantage of the valuable marketing technologies, resources and programs offered by Sage Intacct? In this session, you'll learn how successful partners are creating awareness, generating more leads and executing campaigns to grow their practice. We'll cover the essentials and give you an in-depth view of the technologies available providing actionable insights for new business opportunities – all for free!   |
| <b>4:00 PM – 5:00 PM</b>   |  |
| How to Leverage Marketing Assets in the Sales Cycle<br>INSA04<br>CPE Credits: 1  | Learn about valuable marketing assets you can incorporate at every stage of the sales cycle. Case studies, videos, customer quotes, analyst reports, slide deck templates, past resources from the partner summit and more.  |
| <b>5:15 PM – 6:15 PM</b>   |  |
| Webinars and Dimensional Mailings – Two Top Tactics for Generating Leads and Opportunities<br>INMK04<br>CPE Credits: 1       | What creative tactics have partners used to build their pipelines, move deals through the funnel and close new business? Rookie and veteran partner organizations are using webinars and three dimensional direct mail and seeing success with these marketing campaign types. We'll share the 5 keys to prepare, follow-up, and leverage webinars. We'll also share results on how targeted, tangible direct mail campaigns have performed, can reinvigorate and accelerating deals to closed business. |

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## Tuesday, 3 March

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10:30 AM – 11:30 AM

Marketing and Sales  
Metrics

INSA06

CPE Credits: 1

Understanding your coverage model and waterfall will keep your marketing and sales team on track. Learn how Sage Intacct and top partners measure and forecast success.

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1:30 PM – 2:30 PM

Customers for Life- 7  
Things You should be  
Doing in Customer  
Marketing

INMK06

CPE Credits: 1

Customer marketing is not an accident. It needs to be a thoughtful part of your marketing strategy. In this session, partners will discuss how they are using marketing to advance new Sage Intacct sales, find referrals, build customer success stories and recruit raving sales references. Learn from partners on how they go to market with their customers to tell their story for sales success.

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2:45 PM – 3:45 PM

Building Your Value  
Strategy - Effective  
Techniques for Holding the  
Line on Discounting

INSA08

CPE Credits: 1

Don't let discounts destroy your margin, revenue goals and commission checks. Learn how to effectively communicate the Sage Intacct value proposition during the deal process.

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4:45 PM – 5:45 PM

The New Buyer's Journey

INMK01

CPE Credits: 1

How do Partners respond to the New Buyer's Journey? Hear from partners on how they use technology, customer stories to educate their prospects.

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## Wednesday, 4 March

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9:30 AM – 10:30 AM

What to Do When you Don't  
have an SDR to Follow Up  
on Leads?

INMK09

CPE Credits: 1

We know that partners are more successful if they are able to follow-up with leads in a prompt manner. How can you ensure that happens when you have limited resources. Join this session to learn tactics and strategies to show you how to respond quickly to active leads and drive opportunity growth

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11:30 AM – 12:30 PM

Top 5 Things Every Partner  
Needs to Know about  
Driving Sales and  
Marketing Success

**INMK10**

CPE Credits: 1

Our Top Partners have been consistent and innovative in their marketing and sales activities. Join this session to hear the key drivers and success stories of the top 5 marketing investments partners made this year to drive opportunity growth.

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Breakout sessions are subject to change and additional sessions may be added.

## Advanced sales and marketing track

Are your marketing efforts at their best? Do you have a marketing plan and calendar that you can effectively execute and will deliver the desired results? Join these sessions to learn about some of the priorities to focus on as a VAR Partner to help with your marketing success. These sessions will cover marketing key areas around Nurture and Campaign marketing, Social, Website and Customer content and more.

Audience: Sage Intacct CEOs, sales, and marketing

| Title  | Abstract   |
|--|--|
| <b>Monday, 2 March</b>   |  |
| 1:00 PM – 2:00 PM  |  |
| Opportunity Creation Best Practices<br>INAD01<br>CPE Credits: 1                                    | Learn what unique and exciting things partners are doing to grow their opportunities. You'll hear about partners using SDRs, events, informational webcasts and focusing on micro-verticals to grow their opportunities.   |
| 2:15 PM – 3:15 PM  |  |
| How to Effectively Lead a Multi-Salesperson Sales Team<br>INAD02<br>CPE Credits: 1                 | To truly take your practice to the next level, you need to have more than one salesperson on your team. Hear how top partners have broken through the barrier of a single salesperson to multiple salesperson on their team and their techniques to effectively lead a successful sales team.                        |
| 4:00 PM – 6:15 PM  |  |
| Be a Demo Rockstar - Advanced Demo Techniques That Improve Close Rates<br>INAD03<br>CPE Credits: 2 | How do you take your Demo to the next level? Learn from the best demo jockeys in the Sage Intacct ecosystem. Watch how they prepare prior to the demo, how they engage the prospect, what functionality they always make sure they show and most importantly the questions they ask when engaging with the prospect. |
| <b>Tuesday, 3 March</b>  |  |
| 10:30 AM – 11:30 PM  |  |
| Marketing and Sales Metrics<br>INSA06<br>CPE Credits: 1  | Understanding your coverage model and waterfall will keep your marketing and sales team on track. Learn how Sage Intacct and top partners measure and forecast success.  |

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1:30 PM – 2:30 PM

Learn How to Compete in the Advanced Competitive Landscape

INAD05

CPE Credits: 1

Refining your sales strategy based on competitive information is one of the many tactics you can use to win against NetSuite and 365. Put these winning advanced techniques to the test in your sales cycle and get the ball over the goal line.

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2:45 PM – 3:45 PM

Advanced Sales Workshop

INAD07

CPE Credits: 0

The best salespeople from our top partners discuss the challenges they face, competitive threats, and how they overcome these obstacles in the sales cycle. This session will share some of the best ideas and secrets you can put to practice and execute for success.

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4:45 PM – 5:45 PM

Advanced Marketing Workshop

INAD08

CPE Credits: 0

Top partner marketing team members come together to discuss how they deliver strong marketing campaigns through identifying the target market, leveraging technology, and garnering resources. This session will share some of the best ideas you can put into practice and execute with success.

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### Wednesday, 4 March

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9:30 AM – 10:30 AM

Sales Development - How To Build It Into Your Marketing and Sales Strategy

INAD09

CPE Credits: 1

What is the secret sauce to faster, greater lead conversion? A sales development resource can help you fill the funnel faster when properly executed with marketing tools. Learn best practices around when is the best time to start, how to scale and call strategies, techniques and content to support sales success.

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11:30 AM – 12:30 PM

Understanding the value of Working with Marketplace Partners

INAD10

CPE Credits: 1

75% of all Sage Intacct deals include two or more MPPs. Are you getting your fair share of the business? Learn best practices for driving sales success with your prospect and working with our Marketplace partners around mutual success.

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Breakout sessions are subject to change and additional sessions may be added.

## Sage Intacct Accountant Program Partners

Success starts not only with mapping out a deal-winning strategy early that encompasses every sales stage but also around your marketing efforts. Join these sessions to learn more about the steps you should be going through and what you can accomplish with a winning sales and marketing strategy to make your SIAP practice successful.

Audience: Sage Intacct Accountant Partners (SIAP)

| Title  | Abstract  |
|--|---|
| <b>Monday, 2 March</b>   |   |
| <b>1:00 PM – 2:00 PM</b><br><br>It All Starts with a Great Plan<br><b>INSI01</b><br>CPE Credits: 1     | Can you plan in an ever-changing environment? Is your practice business plan in your head? Is your team aware of your practice goals? This session will cover the planning benefits, the key components used to develop a real growth plan for your outsourcing practice, how to build your team's commitment as well as exploring the key metrics to help you measure your practice performance? During this session there will be hands-on exercises to provide the basis of a core plan that will help grow your practice at the pace of our top partners. |
| <b>2:15 PM – 3:15 PM</b><br><br>Marketing that Actually Works<br><b>INSI02</b><br>CPE Credits: 1       | Are you concerned about wasting money on marketing that doesn't produce results? Learn how to create a successful marketing plan including both strategic and tactical elements, how to schedule and execute your plan, and how to measure results to ensure it is supporting your sales goals.   |
| <b>4:00 PM – 5:00 PM</b><br><br>Referral Marketing, the #1 Activity<br><b>INSI03</b><br>CPE Credits: 1 | Across the board referrals are by far the best source for new sales, but it's not something that "just happens". Generating lots of business from these valued relationships requires a structured and intentional approach! Join us to learn how you be more proactive and systematic in creating a referral marketing program that goes beyond word of mouth or just basic social activities. We'll discuss specific, targeted and actionable steps that will help you immediately increase your pipeline and requires minimal time and money.              |
| <b>5:15 PM – 6:15 PM</b><br><br>Raise your Sales Game<br><b>INSI04</b><br>CPE Credits: 1               | Do you have a Sales Process? Is it being consistently applied across your organization - or is everyone doing their own thing? How effective is it? The SIAP Selling Guide will help ensure that you have a solid and proven process with key metrics that matter to make your sales organization rock!   |

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## Tuesday, 3 March

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10:30 AM – 11:30 AM

Winning Larger Engagements with Higher Profits

INSI05

CPE Credits: 1

Are you correctly pricing your engagements during the sales process? Do you have a good balance between services and technology (or do you think Full Use is too expensive)? We'll uncover the secrets to proper pricing and hear from partners who know how. Your clients, team and bottom line will thank you!

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1:30 PM – 2:30 PM

It's All About the Value

INSI06

CPE Credits: 1

Value selling and fixed price engagements is the key to success but can be difficult to learn and implement. Learn the "why, what, and how" from leading experts on value selling including real life stories and how it can take your SIAP practice to a completely different level!

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2:45 PM – 3:45 PM

State of the Accounting Profession

INSI07

CPE Credits: 1

Join Mark Koziel, EVP of Firm Services at the AICPA for an exclusive update on the major forces and issues currently driving change in the accounting profession.

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4:45 PM – 5:45 PM

There is no I in TEAM

INSI08

CPE Credits: 1

So many resources and so little time, we have lots of ways to help partners but sometimes they can be hard to find! Are you aware that our team can help you with pricing, processes and even marketing dollars? Do you have new staff and need a reboot? By the end of this session, we will get you to the right resources and make sure you are maximizing the benefits available.

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## Wednesday, 4 March

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9:30 AM – 10:30 AM

You Can't Sell if you Don't Close

INSI09

CPE Credits: 1

Many people are uncomfortable with the concept of asking for the business. But if you have followed your defined sales process, this should happen effortlessly. How do you get it over the finish line and not waste time on the wrong prospects?

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11:30 AM – 12:30 PM

Ensuring Long Term Customer Success

INSI10

CPE Credits: 1

You've closed the deal and delivered a successful implementation, now what? Having a long-term plan for client excellence is critical to maintaining strong levels of satisfaction and high retention rates. Join this session to make sure you have a clear plan in place to ensure success every time.

Breakout sessions are subject to change and additional sessions may be added.



## Sage X3 Product track

Focused on everything Sage X3 that you need to know to be successful. With topics spanning finance, distribution and manufacturing you can learn how the latest X3 innovations support our customers today and tomorrow.

Audience: Sage X3 partners

| Title  | Abstract   |
|--|--|
| <b>Monday, 2 March</b>   |  |
| <b>1:00 PM – 2:00 PM</b>   |  |
| What's New in Sage X3, and What's Coming Next<br><b>X3PR01</b><br>CPE Credits: 0                 | Join the team to hear about the innovations delivered in Sage X3 over the past year and learn about what is coming up. During this session we will provide an overview of key new features and capabilities and walk through the Sage X3 roadmap to provide you with a clear understanding of what is coming next.     |
| <b>2:15 PM – 3:15 PM</b>   |  |
| Sage X3 in the Cloud - What You Need to Know to Be Successful<br><b>X3PR02</b><br>CPE Credits: 0 | Delivering robust cloud solutions is vital in today's market and is something many of our customers are now looking to adopt. We will explore the Sage X3 cloud deployment options available today that have been designed to meet customer needs and will help you thrive as a Sage business partner.                 |
| <b>4:00 PM – 5:00 PM</b>   |  |
| Supporting Finance Functions with Sage X3<br><b>X3PR03</b><br>CPE Credits: 0                     | Financials and accounting processes are central to all Sage X3 deployments. Join for an overview of what's new in Sage X3 for finance and legislations and deep dive into tax management innovations and revenue recognition enhancements.   |
| <b>5:15 PM – 6:15 PM</b>   |  |
| Supporting Manufacturing Businesses with Sage X3<br><b>X3PR04</b><br>CPE Credits: 0              | During this session we will explore the rich capabilities within the Sage X3 manufacturing modules and highlight recent enhancements including the new Web Scheduling capabilities and upcoming resource management which will allow you to maximize your return on investment and drive business value for customers. |



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## Tuesday, 3 March

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10:30 AM – 11:30 AM

Supporting Distribution  
Processes with Sage X3  
X3PR05  
CPE Credits: 0

During this session we will explore the deep distribution capabilities within Sage X3 and highlight new capabilities introduced to meet customer needs. We'll also demonstrate how you can help customers to improve the collection and use of data across their supply chain.

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1:30 PM – 2:30 PM

Supporting Project-based  
Businesses with Sage X3  
X3PR06  
CPE Credits: 0

New value-added services and the adoption of "servitization" is changing the way many traditional businesses operate. The demand for services is also growing in many industries and sectors. Join us as we explore the potential of the Sage X3 Project Management (PJM) module and how this can help support your customer's journey.

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2:45 PM – 3:45 PM

Sage X3 Release  
Management and Lifecycle  
Policy - What You Need to  
Know  
X3PR07  
CPE Credits: 0

Join us for this interactive session where we will discuss the Sage X3 release management strategy and walk through the lifecycle policy so you can fully understand any impacts for your customers.

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4:45 PM – 5:45 PM

Localizing Sage X3 for Your  
Markets  
X3PR08  
CPE Credits: 0

Sage X3 is designed to support our customers across many industries around the world. Join this session as we explore the legislation and localization programme and walk you through updates that will ensure you can help your customers meet local or industry regulations.

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## Wednesday, 4 March

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9:30 AM – 10:30 AM

Improving System  
Performance by Safely  
Archiving Unused Data  
X3PR09  
CPE Credits: 0

Do you have Sage X3 customers with growing datasets that are causing performance challenges, impacting critical business tasks or increasing maintenance windows? The new Data Management Suite (DMS) could be the answer as it allows you to address challenges caused by growing data volumes. You can now safely archive a customer's data from an Sage X3 live system to a remote data vault using the DMS tools and methodology and also query it later as needed. Join us as we explore the DMS toolbox, the data archiving governance and the steps you need to take to be certified to deliver this service to your customers.

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11:30 AM – 12:30 PM

Recap and Panel

X3PR10

CPE Credits: 0

Join the Sage team as we wrap up the Sage X3 breakout sessions with an interactive recap and panel session.

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Breakout sessions are subject to change and additional sessions may be added.

## Sage X3 Technical track

With technical deep dive sessions and hands-on labs, the Sage X3 technical track is your opportunity to learn and try out for the X3 innovations that will help you harness cutting-edge technologies to deliver the perfect solution to your customers.

Audience: Sage X3 partners

| Title   | Abstract  |
|---|---|
| <b>Monday, 2 March</b>  |   |
| 1:00 PM – 2:00 PM   |   |
| What's New in Sage X3, and What's Coming Next<br>X3PR01<br>CPE Credits: 0                                 | Join the team to hear about the innovations delivered in Sage X3 over the past year and learn about what is coming up. During this session we will provide an overview of key new features and capabilities and walk through the Sage X3 roadmap to provide you with a clear understanding of what is coming next.  |
| 2:15 PM – 3:15 PM   |   |
| APIs: Opening the Door to Rapid Innovation, Integration and Extending Sage X3<br>X3TE01<br>CPE Credits: 1 | Recent Sage X3 innovations support new and simpler ways of delivering the perfect solution to your customers. Learn how the API framework is changing how we integrate solutions and how you can quickly and more easily provide customers with the end-to-end experience they crave. We will show you how to engage with the Sage ecosystem or quickly expand the Sage X3 application with your own IP. This session is followed by a hands-on lab so you can try out the API innovations for yourself.  |
| 4:00 PM – 6:15 PM   |   |
| APIs Hands-on Lab<br>X3TE02<br>CPE Credits: 2   | Roll up your sleeves and try out the API innovations for yourself! Bring your PC to this hands-on lab so you can explore the functionality with Sage experts as you build your first API driven solution. You must bring your PC.   |
| <b>Tuesday, 3 March</b>   |   |
| 10:30 AM – 11:30 AM   |   |
| Extending Sage X3 with the Developer Studio<br>X3TE03<br>CPE Credits: 1                                   | Learn how Sage X3 is bringing powerful open source technologies to life. We will explore the Developer Studio and new technologies that deliver efficiency as you build your key customizations. We will explore innovations to the way products are built and how services are consumed, and show you how Sage X3 delivers cutting-edge open source technologies, world-class user experience and tools that will allow you to expand your business with value-added complementary solutions and new industry offerings. This session is followed by a hands-on lab, so you can try out the Developer Studio for yourself. |

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1:30 PM – 3:45 PM

Sage X3 Developer Studio  
Lab  
X3TE04  
CPE Credits: 2

Attend this hands-on lab to try out the Developer Studio for yourself. Bring your PC so you can explore the functionality and learn how to harness these cutting-edge technologies with Sage experts on hand. You must bring your PC.

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4:45 PM – 5:45 PM

Building Upgrade Safe  
Customizations and  
Indestructible Add-ons  
X3TE05  
CPE Credits: 1

Join this session to learn from Sage experts how you can leverage the Sage X3 platform to build and deploy upgrade safe customizations. During this session we will also cover new tooling including cucumber, and how to harness automated test scripts.

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**Wednesday, 4 March**

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9:30 AM – 10:30 AM

Delivering Powerful Industry  
Solutions with Sage X3  
X3TE06  
CPE Credits: 1

How can you be sure you are delivering a powerful and comprehensive solution for your customers? Join this session to understand how core Sage X3 capabilities and add-ons help you to develop and build powerful industry solutions that you can take to market to help grow your business.

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11:30 AM – 12:30 PM

Recap and Panel  
X3PR10  
CPE Credits: 0

Join the Sage team as we wrap up the Sage X3 breakout sessions with an interactive recap and panel session.

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Breakout sessions are subject to change and additional sessions may be added.

## Sage X3 Enablement and Marketing track

Fuel your sales, services and marketing teams with high-performance sessions designed to accelerate growth through industry and vertical market development, Marketplace opportunities and working together to deliver solutions in a Cloud economy.

Audience: Sage X3 partners

| Title   | Abstract  |
|---|---|
| <b>Monday, 2 March</b>  |   |
| <b>1:00 PM – 2:00 PM</b>  |   |
| Sage's Vertical Strategy:<br>Why and How<br><a href="#">X3SM01</a><br>CPE Credits: 0                                | Join the team as we walk through the Sage X3 vertical market strategy. During this session we will outline the key strategic verticals and discuss how Sage X3 will evolve to support these markets and help you drive success with your customers.   |
| <b>2:15 PM – 3:15 PM</b>  |   |
| How to Develop and Win<br>Business in the Chemicals<br>Industry<br><a href="#">X3SM02</a><br>CPE Credits: 0         | Are you turning away opportunities in the Chemicals industry? If the answer is yes then join Sage experts and leading Sage X3 partner Net at Work to explore how you can meet challenges faced by today's chemical manufacturers and distributors as they try to maintain competitiveness while complying with an increasing array of challenges from government regulations, increasing global competition and pricing.          |
| <b>4:00 PM – 5:00 PM</b>  |   |
| How to Develop and Win<br>Business in the Agriculture<br>Industry<br><a href="#">X3SM03</a><br>CPE Credits: 0       | Is the Agriculture industry a mystery? Join Sage experts and Sage X3 partner Aritmos as we explore Sage X3 solutions specialized and personalized for the Agriculture industry - whether it is cereals in the United States, South African fruit and vegetable production or farm to fork in the UK, this session will discuss how you can gain expertise and win agriculture deals.  |
| <b>5:15 PM – 6:15 PM</b>  |   |
| How to Develop and Win<br>Business in the Food and<br>Beverage Industry<br><a href="#">X3SM04</a><br>CPE Credits: 0 | Today's Food and Beverage manufacturers face an especially complex market due to food safety requirements and high customer expectations. Essential to success is a flexible, robust system that can manage your finances, recipes, operations, distribution, supply chain and customer interactions all in one place. Join the Sage X3 team and partner NexTec as we explore how you can take advantage of opportunities in F&B. |

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## Tuesday, 3 March

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10:30 AM – 11:30 PM

Sage X3 ISV Ecosystem  
Strategy and Marketplace  
Opportunity

X3SM05

CPE Credits: 0

Building a thriving Ecosystem to help customers and partners grow is a critical strategic focus so there's never been a better time to partner with Sage. In this session you will learn about our strategy and how we are promoting and distributing solutions through the Sage Marketplace. Find out how to best engage and collaborate effectively with Sage and our Ecosystem to deliver commercial success.

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1:30 PM – 2:30 PM

Anatomy of a Sage X3 Win

X3SM06

CPE Credits: 0

Attend this session to learn from a panel of partners about the sales cycle, competition, obstacles to success, deal packaging and pricing, and post-sales engagement and challenges. An open Q&A will allow audience members to probe into specific areas of interest around game-changing partner wins.

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2:45 PM – 3:45 PM

AWS Cloud Essentials:  
Requirements and Benefits  
of Hosting on the AWS  
Cloud Platform

X3SM07

CPE Credits: 0

Join the Amazon Web Services team to learn about the essentials of hosting solutions such as Sage X3 on AWS, the world's largest cloud service provider. Migrating to AWS increases competitive edge, operational agility and modernizes IT infrastructure. During this session we'll share the many benefits and support available to partners, including the AWS ISV Workload Migration Program to help your customers achieve their business goals and help you accelerate their journey to the cloud.

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4:45 PM – 5:45 PM

Becoming a Great SaaS  
Partner with a Focus on  
Differentiating for Success

X3SM08

CPE Credits: 0

In this session we will share an overview of the IDC info-brief and webinar series covering the three core pillars of being a successful SaaS partner - Differentiating for Success, Customer Success and Measuring Success. We will also share partner insights on differentiation, where partners have mastered the art of IP and built a successful business model around their unique expertise.

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## Wednesday, 4 March

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9:30 AM – 10:30 AM

Jay McBain - Collaborating  
to Win and Making the  
Ecosystem Work for You

X3SM09

CPE Credits: 0

In this session Jay McBain will share how partners are being successful working together to deliver whole solutions in a Cloud economy. Jay will deep dive into how the changing buyer journey is impacting the channel and share the importance of being part of the partner Ecosystem.

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11:30 AM – 12:30 PM

Selling Through Curiosity –  
what does flawless sales  
execution look like?

X3SM10

CPE Credits: 0

What if you and your entire customer-facing organization were able to do flawless discovery and qualification, therefore understanding your customer better than your competition? What if you could create so much value in your customers' minds that they want your solution no matter what the price? Barry will show you the most effective ways to make sure every deal you touch is set up to win.

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Breakout sessions are subject to change and additional sessions may be added.



## Sage People

Help your customers manage their entire employee journey with the leading HR and people solution on the Salesforce platform, Sage People. Join our team of Sage People professionals to learn strategies for extending your value as a trusted advisor and helping your customers transform into people companies. Get tips and tricks to becoming an HR & People expert for medium-sized businesses and gain an understanding of the partner programs designed to ensure the long-term success of you and your customers.

Audience: All Sage People partners and prospective partners

| Title  | Abstract   |
|--|--|
| <b>Monday, 2 March</b>   |  |
| 1:00 PM – 2:00 PM<br><br>Sage People Partner Programme<br>PEOP01<br>CPE Credits: 0                   | Help your customers manage their entire employee journey with the leading HR and people solution on the Salesforce platform, Sage People. Join our team of Sage People professionals to learn how you can extend your value as a trusted advisor, help your customers transform into people companies and become an HR & People expert for your medium-sized business customers. This session will provide you an overview and understanding of the Sage People Partner Programs designed to ensure the long term success of you and your customers. |
| 2:15 PM – 3:15 PM<br><br>Become a Sage People Expert (product deep dive)<br>PEOP02<br>CPE Credits: 0 | Explore Sage People, the leading HR and people management solution, with a system expert who will review the full depth and breadth of the product's functionality, covering everything from onboarding to alumni. Position yourself as a trusted expert to your customers with this informative product session.  |
| 5:15 PM – 6:15 PM<br><br>Build a Healthy Sales Pipeline with Sage People<br>PEOP03<br>CPE Credits: 0 | Generating new sales opportunities remains a consistent challenge in today's ever-changing business environment. This session offers a look at the Sage People value proposition, highlighting its position and competitive advantage in the marketplace to help your customers attract, manage, and retain top talent. Plus, learn the strategies for building qualified sales leads and how to successfully execute against them.  |
| <b>Tuesday, 3 March</b>  |  |
| 10:30 AM – 11:30 AM<br><br>Sage People Implementation 101<br>PEOP04<br>CPE Credits: 0                | Sage People is designed specifically for medium-sized and multinational organizations, and we've made it quick to implement for instant workforce visibility, increased productivity, and more. Join us to review the seamless implementation process, capabilities, and best practices with specialists from the Sage People Customers for Life team.   |



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2:45 PM – 3:45 PM

Ensuring your Customers' Success

PEOP05

CPE Credits: 0

Discover how the results Sage People helps produce, like increasing HR productivity by up to 80% by eliminating labor-intensive manual processing, can help support your customers' success and drive continued business growth with the Sage People Customer Success and Support teams.

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Breakout sessions are subject to change and additional sessions may be added.

## Sponsors Sessions

Join our sponsors on a variety of empowering topics and engage in live demonstrations where you can interact with developers and company. Learn how to automate your expense management process from swipe to settlement, discover ways to transform field service quote to cash lifecycle and accelerate business growth. Learn to streamline payment processing and run an agile organization. You'll also receive insights on leveraging the power of people and financial analytics to rethink ecosystems and data and how this can empower you in your role and impact across the organization.

Audience: Sage Intacct Partners

| Title   | Abstract   |
|---|--|
| <b>Monday, 2 March</b>  |  |
| <b>10:50 AM – 11:10 AM</b>  |  |
| Expensify + Sage Intacct: End-to-End Automation<br><b>THEA02</b><br>Expensify<br>CPE Credits: 0   | Join Expensify's Head of Sage Intacct Sales, Ryan Donato, for a glimpse into how Expensify can automate your expense management process from swipe to settlement through a direct integration with Sage Intacct. Ryan will also cover Expensify's core features and coding support, then share recent updates on the Expensify Card.   |
| <b>10:50 AM – 11:10 AM</b>  |  |
| Fuel Growth Potential – Drive Recurring Revenue and Customer Loyalty with Prophix CPM for Sage<br><b>THEA09</b><br>Prophix Software<br>CPE Credits: 0 | As a Sage Intacct and Sage X3 Rockstar Partner, Prophix seamlessly integrates with Sage to streamline financial processes resulting in time saved, improved resource management, and more time for strategic analysis.<br><br>In this session, we will discuss how to expand on the functionality available to customers and strengthen the foothold for Sage and its partners. Learn to recognize available opportunities and new revenue streams and see a live product demonstration.   |
| <b>11:15 AM – 11:35 AM</b>  |  |
| A/R & E-Com Payments Automation: Increase Cash Flow and Reduce Operating Costs<br><b>THEA12</b><br>2C Processor<br>CPE Credits: 0                     | 2C Processor's session showcases our Customer Portal, Recurring Payments, Email Invoicing, WooCommerce, Magento, Drupal, and other E-Commerce applications, and much more in a live demo where you can interact with developers and company principals. We will show you how automation of both accounts receivable payments and ecommerce sales into Sage Intacct, using our applications built on the Sage Intacct platform, will increase your cash flow velocity and enable your staff to devote time and resources to value-added activities rather than manual data entry. |

|                     |   |  |
|---------------------|---|--|
| 11:40 AM – 12:00 PM | <p>Make Better Decisions through Advanced Reporting</p> <p><b>THEA33</b></p> <p>Solver, Inc</p> <p>CPE Credits: 0</p>                         | <p>Is too much time spent on tedious manual processes instead of valuable analysis? Learn how organizations are using Solver to access organization-wide data through a single cloud-based solution, to gain actionable insights, and make better, faster decisions.</p> <ul style="list-style-type: none"> <li>• Stop the guesswork with powerful visualizations and alerts to identify and isolate variances that require immediate attention</li> <li>• Get the right information to the right people by consolidating critical financial and operational data into meaningful automated reports</li> <li>• Effectively use KPIs to track financial performance and ensure alignment to strategy</li> </ul> |
| 11:40 AM – 12:00 PM | <p>The Benefits of Continuous Planning with Planful</p> <p><b>THEA34</b></p> <p>Planful</p> <p>CPE Credits: 0</p>                             | <p>Modern finance calls for modern tools. Join us for a live demo and see how Planful's Continuous Planning platform marries finance's need for structured planning with the business' need for dynamic planning, enabling organizations to elevate the financial conversation, and make better decisions more quickly, confidently, and strategically. See how Planful (formerly Host Analytics) is delivering Continuous Planning to over 800 customers around the world.</p>  |
| 12:10 PM – 12:30 PM | <p>GUMU Cloud: One Stop Solution for All Integrations</p> <p><b>THEA03</b></p> <p>Greytrix</p> <p>CPE Credits: 0</p>                          | <p>If you require to extend Sage X3 OR Sage Intacct functionality by using best of breed CRM, eCommerce, Payment Gateways, POS systems, WMS or ANY Biz Apps at a reasonable rate. Greytrix will showcase its GUMU Cloud, the next generation integration platform built on its GUMU™ framework since 20 years taking the example of Salesforce.com integration.</p>  |
| 12:10 PM – 12:30 PM | <p>Driving the Future of Work</p> <p><b>THEA04</b></p> <p>ADP</p> <p>CPE Credits: 0</p>   | <p>Join ADP for an innovative session on ADP and Sage Intacct: ecosystems, data and the future of work. The world of work is changing and so are the ways organizations are thinking about utilizing their data. In this session we will review how ADP sees leaders and practitioners increasingly leveraging the power of people and financial analytics to rethink ecosystems and data. You will learn how this can empower you in your role and impact across the organization. Stop by ADP's booth to learn about the benefits of the ADP and Sage Intacct integration and how it empowers organizations with greater insights, efficiency and peace of mind.</p>   |
| 12:35 PM – 12:55 PM | <p>Driving growth in facilities services with smart assets and smarter workers</p> <p><b>THEA05</b></p> <p>KloudGin</p> <p>CPE Credits: 0</p> | <p>By embracing modern, cloud-based, native mobile applications for intelligent fieldwork and asset management, mid-market businesses are able to transform their field service quote to cash lifecycle. Rugged, easy to use mobile technologies that keep workers connected, informed, and engaged, are driving big improvements in workforce productivity, customer experience, and cash flow.</p>   |

|                     |   |   |
|---------------------|---|---|
| 12:35 PM – 12:55 PM | <p>How to Achieve Hands-free Invoice Processing Automation From a VAR Partner Perspective</p> <p><b>THEA06</b></p> <p>Yooz Inc.</p> <p>CPE Credits: 0</p> | <p>Hear first-hand from a Yooz VAR partner, Kerr Consulting how automating your client's invoice and payment processing workflow solves for a CFO's biggest pain points. Plus, gain a clear understanding of how the entire finance department will benefit from AP automation by dramatic cost savings that go straight to the bottom line, increased staff productivity and morale, and time savings that free staff and management alike for more strategic, value-added initiatives...all seamlessly integrated with Sage Intacct ERP. And the fun continues! When you attend our Theater Session you will receive a cool Yooz water bottle and a Starbucks® gift card. We look forward to meeting you!</p>                   |
| 1:00 PM – 2:00 PM   | <p>Bring Continuous Planning to Your Clients!</p> <p><b>SPON01</b></p> <p>Planful</p> <p>CPE Credits: 0</p>   | <p>Learn how Planful is delivering Continuous Planning, Close and Reporting to over 800 clients around the world. This session will focus on the fit and value that Planful brings to the Sage and Intacct ecosystems. Key topics addressed will be: * How clients are leveraging the full Planful platform to solve for many financial and operational needs across the enterprise * Differentiation of Planful compared to other solutions in the market * Current and future integration with Intacct and Sage * Details on the resell and services opportunities around the Planful platform Partner with the market leader in Continuous Planning and create a significant, recurring business in the Planful ecosystem!</p> |
| 2:15 PM – 3:15 PM   | <p>The mid-market landscape</p> <p><b>SPON02</b></p> <p>PwC</p> <p>CPE Credits: 0</p>   | <p>Led by PwC's US lead for middle-market technology and digital solutions, this session will share PwC's perspectives and hold interactive dialogue on how organizations undertake decision-making on ERPs, what decision criteria are ultimately the deciding factors, the perceptions of how mid-market ERP platforms are comparatively positioned, and more.</p>  |
| 3:25 PM – 3:45 PM   | <p>A people led approach to change</p> <p><b>THEA07</b></p> <p>PwC</p> <p>CPE Credits: 0</p>  | <p>A people-focused approach is often what's missing at the heart of transformation. Using Sage as the case study, come and join a discussion focussed at how, by investing in people, your organisation can improve performance and customer outcomes.</p>   |

|   |  |
|---|--|
| <p>4:00 PM – 5:00 PM</p> <p>A/R &amp; E-Com Payments Automation: Increase Cash Flow and Reduce Operating Costs</p> <p><b>SPON03</b></p> <p>2C Processor</p> <p>CPE Credits: 0</p>   | <p>2C Processor's session showcases our Customer Portal, Recurring Payments, Email Invoicing, WooCommerce, Magento, Drupal, and other E-Commerce applications, and much more in a live demo where you can interact with developers and company principals. We will show you how automation of both accounts receivable payments and ecommerce sales into Sage Intacct, using our applications built on the Sage Intacct platform, will increase your cash flow velocity and enable your staff to devote time and resources to value-added activities rather than manual data entry.</p>  |
| <p>5:15 PM – 6:15 PM</p> <p>Advanced Planning, Financial Reporting, and Consolidation</p> <p><b>SPON04</b></p> <p>Solver, Inc</p> <p>CPE Credits: 0</p>                             | <p>Are you one of those organizations that dread the Budgeting and Reporting processes? Well, good news – it doesn't need to be that way! Join us for a live demonstration of Solver, one of G2's highest rated Corporate Performance Management (CPM) solutions, and learn how organizations are able to gain actionable insights, and make better, faster decisions.</p> <p>Quickly respond to change with powerful visualizations and alerts to identify and isolate variances that require immediate attention</p> <ul style="list-style-type: none"> <li>• Create dynamic "what-if" scenarios and run simulations to determine the most accurate outcome for more effective budgeting and forecasting</li> <li>• Get the right information to the right people by consolidating critical financial from Sage Intacct, Sage 100, Sage 300, Sage 500, Sage X3 and operational data into meaningful automated reports</li> <li>• Effectively use KPIs to monitor and measure performance and ensure alignment to strategy</li> </ul> |
| <p><b>Tuesday, 3 March</b></p>  |  |
| <p>09:40 AM – 10:00 AM</p> <p>A/R &amp; E-Com Payments Automation: Increase Cash Flow and Reduce Operating Costs</p> <p><b>THEA13</b></p> <p>2C Processor</p> <p>CPE Credits: 0</p> | <p>2C Processor's session showcases our Customer Portal, Recurring Payments, Email Invoicing, WooCommerce, Magento, Drupal, and other E-Commerce applications, and much more in a live demo where you can interact with developers and company principals. We will show you how automation of both accounts receivable payments and ecommerce sales into Sage Intacct, using our applications built on the Sage Intacct platform, will increase your cash flow velocity and enable your staff to devote time and resources to value-added activities rather than manual data entry.</p>  |

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10:05 AM – 10:25 AM

Fuel Growth Potential –  
Drive Recurring Revenue  
and Customer Loyalty with  
Prophix CPM for Sage

**THEA15**

Prophix Software

CPE Credits: 0

As a Sage Intacct and Sage X3 Rockstar Partner, Prophix seamlessly integrates with Sage to streamline financial processes resulting in time saved, improved resource management, and more time for strategic analysis.

In this session, we will discuss how to expand on the functionality available to customers and strengthen the foothold for Sage and its partners. Learn to recognize available opportunities and new revenue streams and see a live product demonstration.

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10:30 AM – 11:30 PM

Working with PwC as part  
of the partner ecosystem

**SPON05**

PwC

CPE Credits: 0

Are you a Sage partner interested in winning and delivering Sage X3 business with PwC, come hear how we can complement each other and work together to successfully transform our clients' businesses and exceed their expectations. We will also share case studies of where we have worked with Sage partners to date.

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11:50 PM – 12:10 PM

The Only Integrated  
Payments into Sage X3 and  
Sage Intacct

**THEA18**

Paya

CPE Credits: 0

Find out how Paya's seamless payments integration into Sage X3 and Sage Intacct fits into your ERP workflow. Paya can help you manage core business processes, providing secure real-time card, and ACH acceptance. Learn how to accelerate business growth, streamline payment processing, and run an agile organization with the only Sage certified payments provider.

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11:50 PM – 12:10 PM

The Benefits of Continuous  
Planning with Planful

**THEA17**

Planful

CPE Credits: 0

Modern finance calls for modern tools. Join us for a live demo and see how Planful's Continuous Planning platform marries finance's need for structured planning with the business' need for dynamic planning, enabling organizations to elevate the financial conversation, and make better decisions more quickly, confidently, and strategically. See how Planful (formerly Host Analytics) is delivering Continuous Planning to over 800 customers around the world.

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12:25 PM – 12:45 PM

APS + Sage Intacct  
Integration Feature  
Enhancements

**THEA20**

APS Payroll

CPE Credits: 0

We will present updates to our integration to solve the challenges that were brought up by partners at the Advantage Conference in October 2019. We will also present future enhancements to better the client and partner experience, as well as service and revenue potential for partners.



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1:00 PM – 1:20 PM

Transforming Business Strategy Through AP Automation with Sage Intacct

**THEA21**

AvidXchange

CPE Credits: 0

Businesses today still depend on manual, paper-based accounts payable processing. Companies are looking to focus on more strategic activities and eliminate manual processes. Join AvidXchange to learn how we automate the way users pay their bills by providing invoice capture, approval workflows, electronic payments, and seamless integration with Sage Intacct.

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1:00 PM – 1:20 PM

Make Better Decisions through Advanced Reporting

**THEA22**

Solver, Inc

CPE Credits: 0

Is too much time spent on tedious manual processes instead of valuable analysis? Learn how organizations are using Solver to access organization-wide data through a single cloud-based solution, to gain actionable insights, and make better, faster decisions.

- Stop the guesswork with powerful visualizations and alerts to identify and isolate variances that require immediate attention
- Get the right information to the right people by consolidating critical financial and operational data into meaningful automated reports
- Effectively use KPIs to track financial performance and ensure alignment to strategy

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2:45 PM – 3:45 PM

Fuel Growth Potential – Drive Recurring Revenue and Customer Loyalty with Prophix CPM for Sage

**SPON07**

Prophix Software

CPE Credits: 0

As a Sage Intacct and Sage X3 Rockstar Partner, Prophix seamlessly integrates with Sage to streamline financial processes resulting in time saved, improved resource management, and more time for strategic analysis. In this session, we will discuss how to expand on the functionality available to customers and strengthen the foothold for Sage and its partners. Learn to recognize available opportunities and new revenue streams and see a live product demonstration.

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3:50 PM – 4:10 PM

Working with PwC as part of the partner ecosystem

**THEA23**

PwC

CPE Credits: 0

Are you a Sage partner interested in winning and delivering Sage X3 business with PwC, come hear how we can complement each other and work together to successfully transform our clients' businesses and exceed their expectations. We will also share case studies of where we have worked with Sage partners to date.

|                                  |  |  |
|----------------------------------|--|--|
| 3:50 PM – 4:10 PM                | <p>Supercharge Your FP&amp;A Processes with Vena and Intacct!</p> <p><b>THEA24</b></p> <p>Vena Solutions</p> <p>CPE Credits: 0</p>                       | <p>Learn how Vena is used to streamline the planning, budgeting, forecasting, and reporting processes - enhancing the value of the Sage Intacct while de-risking these important yet labor-intensive business processes. We'll share with you how Vena removes the need to wrangle spreadsheets, distribute and collect spreadsheet files, and worry about error-prone manual processes. Vena pulls organizations out of the proverbial Excel Hell environment by automating these processes, integrating directly with Sage Intacct, while embracing native Excel delivering a controlled and familiar experience for end-users. We'll share two customer examples of how they enhanced their Sage Intacct investment with a best-of-breed FP&amp;A cloud solution from Vena.</p> |
| 4:15 PM – 4:35 PM                | <p>A/R &amp; E-Com Payments Automation: Increase Cash Flow and Reduce Operating Costs</p> <p><b>THEA25</b></p> <p>2C Processor</p> <p>CPE Credits: 0</p> | <p>2C Processor's session showcases our Customer Portal, Recurring Payments, Email Invoicing, WooCommerce, Magento, Drupal, and other E-Commerce applications, and much more in a live demo where you can interact with developers and company principals. We will show you how automation of both accounts receivable payments and ecommerce sales into Sage Intacct, using our applications built on the Sage Intacct platform, will increase your cash flow velocity and enable your staff to devote time and resources to value-added activities rather than manual data entry.</p>  |
| <p><b>Wednesday, 4 March</b></p> |  |  |
| 10:35 AM – 10:55 AM              | <p>The Benefits of Continuous Planning with Planful</p> <p><b>THEA29</b></p> <p>Planful</p> <p>CPE Credits: 0</p>  | <p>Modern finance calls for modern tools. Join us for a live demo and see how Planful's Continuous Planning platform marries finance's need for structured planning with the business' need for dynamic planning, enabling organizations to elevate the financial conversation, and make better decisions more quickly, confidently, and strategically. See how Planful (formerly Host Analytics) is delivering Continuous Planning to over 800 customers around the world.</p>  |
| 10:35 AM – 10:55 AM              | <p>Drive Your Business Forward with Bill.com</p> <p><b>THEA30</b></p> <p>Bill.com</p> <p>CPE Credits: 0</p>  | <p>Join us for an informative session on how adding Bill.com to your product portfolio can help you drive your business forward. With thousands of joint customers and as the 2019 Sage Intacct Marketplace Partner of the Year, we understand your customers and how important they are to your business. We make it easy for you to deepen your customer engagement with an automated AP solution while driving new revenue opportunities for your business – without hassle. In this 20-minute session, you'll hear about our different partner programs and which one is right for you. You'll also hear from some of our partners on how they have successfully</p>   |



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worked with Bill.com and they'll offer advice on how to make the most out of your partnership.

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11:00 AM – 11:20 AM

Grow your Business Faster  
with Advanced Budgeting  
and Forecasting

THEA31

Solver, Inc

CPE Credits: 0

Learn how companies are redefining the budgeting and forecasting process by using Solver to implement best practices, streamline and automate processes, and escape “Excel hell”.

- Incorporate strategy and goals into the Planning process to ensure organizational alignment and accurately measure performance.
  - When to use simulations, and how to create and run unlimited what-if scenario analysis on the fly.
  - Improve overall budgeting accuracy, quickly catch errors, adjust for market changes, and take advantage of growth opportunities.
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Breakout sessions are subject to change and additional sessions may be added.

## Sponsors Sessions

Join our sponsors on a variety of empowering topics and engage in live demonstrations where you can interact with developers and company. Learn how to automate your expense management process from swipe to settlement, discover ways to transform field service quote to cash lifecycle and accelerate business growth. Learn to streamline payment processing and run an agile organization. You'll also receive insights on leveraging the power of people and financial analytics to rethink ecosystems and data and how this can empower you in your role and impact across the organization.

Audience: Sage X3 Partners

| Title   | Abstract   |
|---|--|
| <b>Monday, 2 March</b>  |  |
| 09:35 AM – 09:55 AM   |  |
| Do you Want to Build a Relationship with Sales Directors Across Your Base? There's an App for That!<br><b>THEA01</b><br>Skynamo<br>CPE Credits: 0     | In this session, learn 1) why Finance and Sales teams are often at odds 2) how an app can help them get along by bridging the gap between ERP and CRM systems 3) how Skynamo can unlock new revenue streams for your business and increase customer retention.   |
| 09:35 AM – 09:55 AM   |  |
| Growing your revenue opportunities with Sage Enterprise Intelligence V9 – Cloud, ETL, BI<br><b>THEA10</b><br>Tangerine Software<br>CPE Credits: 0     | With data being the most valuable resource for all organizations be ready for your customers' needs with SEI V9. Build their confidence with cloud ready advanced analytics and the all new ETL / DataSync module, while driving new revenue opportunities, including new customer acquisitions.   |
| 10:50 AM – 11:10 AM   |  |
| Fuel Growth Potential – Drive Recurring Revenue and Customer Loyalty with Prophix CPM for Sage<br><b>THEA09</b><br>Prophix Software<br>CPE Credits: 0 | As a Sage Intacct and Sage X3 Rockstar Partner, Prophix seamlessly integrates with Sage to streamline financial processes resulting in time saved, improved resource management, and more time for strategic analysis.<br><br>In this session, we will discuss how to expand on the functionality available to customers and strengthen the foothold for Sage and its partners. Learn to recognize available opportunities and new revenue streams and see a live product demonstration. |

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12:10 PM – 12:30 PM

GUMU Cloud: One Stop  
Solution for All Integrations

THEA03

Greytrix

CPE Credits: 0

If you require to extend Sage X3 OR Sage Intacct functionality by using best of breed CRM, eCommerce, Payment Gateways, POS systems, WMS or ANY Biz Apps at a reasonable rate. Greytrix will showcase its GUMU Cloud, the next generation integration platform built on its GUMU™ framework since 20 years taking the example of Salesforce.com integration.

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12:35 PM – 12:55 PM

How to Achieve Hands-free  
Invoice Processing  
Automation From a VAR  
Partner Perspective

THEA06

Yooz Inc.

CPE Credits: 0

Hear first-hand from a Yooz VAR partner, Kerr Consulting how automating your client's invoice and payment processing workflow solves for a CFO's biggest pain points. Plus, gain a clear understanding of how the entire finance department will benefit from AP automation by dramatic cost savings that go straight to the bottom line, increased staff productivity and morale, and time savings that free staff and management alike for more strategic, value-added initiatives...all seamlessly integrated with Sage Intacct ERP. And the fun continues! When you attend our Theater Session you will receive a cool Yooz water bottle and a Starbucks® gift card. We look forward to meeting you!

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2:15 PM – 3:15 PM

The mid-market landscape

SPON02

PwC

CPE Credits: 0

Led by PwC's US lead for middle-market technology and digital solutions, this session will share PwC's perspectives and hold interactive dialogue on how organizations undertake decision-making on ERPs, what decision criteria are ultimately the deciding factors, the perceptions of how mid-market ERP platforms are comparatively positioned, and more.

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3:25 PM – 3:45 PM

A people led approach to  
change

THEA07

PwC

CPE Credits: 0

A people-focused approach is often what's missing at the heart of transformation. Using Sage as the case study, come and join a discussion focussed at how, by investing in people, your organisation can improve performance and customer outcomes.

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3:25 PM – 3:45 PM

Plug and play MES  
software to drive  
performance

THEA08

LYNQ

CPE Credits: 0

Achieving delivery, quality and financial goals relies on the effectiveness of your resources. Getting the most from your employees and machines goes beyond scheduling. It requires intelligent insight of where time is being lost, using technology that can automate data collection and optimise workflow, to seamlessly connect planning and production activities.

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4:00 PM – 5:00 PM

Seamlessly combine Cloud Business Analytics and Data Management with Sage Enterprise Intelligence V9

**SPON09**

Tangerine Software

CPE Credits: 0

Grow your Sage business revenue significantly with Sage Enterprise Intelligence. Discover SEI Version 9 Cloud analytics, which includes a new ETL / Datasync module for data transformation, consolidation and migration. As the only all-in-one Sage BI solution, SEI provides partners the competitive advantage needed to thrive.

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6:20 PM – 6:50 PM

Guts, Glory, and a Guinness Record: The Pursuit of 700 Demos in a Day

**THEA11**

Zoom info

CPE Credits: 0

The story -- the tools, tricks and tips -- of how the ZoomInfo sales team booked close to 700 demos in 24 hours, and (possibly) set a world record.

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6:20 PM – 6:50 PM

Do you Want to Build a Relationship with Sales Directors Across Your Base? There's an App for That!

**THEA36**

Skynamo

CPE Credits: 0

In this session, learn 1) why Finance and Sales teams are often at odds 2) how an app can help them get along by bridging the gap between ERP and CRM systems 3) how Skynamo can unlock new revenue streams for your business and increase customer retention.

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**Tuesday, 3 March**

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09:40 AM – 10:00 AM

Growing your revenue opportunities with Sage Enterprise Intelligence V9 – Cloud, ETL, BI

**THEA14**

Tangerine Software

CPE Credits: 0

With data being the most valuable resource for all organizations be ready for your customers' needs with SEI V9. Build their confidence with cloud ready advanced analytics and the all new ETL / DataSync module, while driving new revenue opportunities, including new customer acquisitions.

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10:05 AM – 10:25 AM

Fuel Growth Potential – Drive Recurring Revenue and Customer Loyalty with Prophix CPM for Sage

**THEA15**

Prophix Software

CPE Credits: 0

As a Sage Intacct and Sage X3 Rockstar Partner, Prophix seamlessly integrates with Sage to streamline financial processes resulting in time saved, improved resource management, and more time for strategic analysis.

In this session, we will discuss how to expand on the functionality available to customers and strengthen the foothold for Sage and its partners. Learn to recognize available opportunities and new revenue streams and see a live product demonstration.

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10:05 AM – 10:25 AM

Do you Want to Build a Relationship with Sales Directors Across Your Base? There's an App for That!

**THEA16**

Skynamo

CPE Credits: 0

In this session, learn 1) why Finance and Sales teams are often at odds 2) how an app can help them get along by bridging the gap between ERP and CRM systems 3) how Skynamo can unlock new revenue streams for your business and increase customer retention.

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10:30 AM – 11:30 PM

Working with PwC as part of the partner ecosystem

**SPON05**

PwC

CPE Credits: 0

Are you a Sage partner interested in winning and delivering Sage X3 business with PwC, come hear how we can complement each other and work together to successfully transform our clients' businesses and exceed their expectations. We will also share case studies of where we have worked with Sage partners to date.

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11:50 AM – 12:10 PM

Paya's Next-Generation Integrated Payments Platform Drives B2B Optimization for Sage X3 and Sage Intacct

**THEA18**

Paya

CPE Credits: 0

For nearly two decades, electronic payments have been the hallmark of B2C transactions; however, card-based payments and ACH are on the rise for B2B. Learn how Paya – the only Sage-certified payments provider – delivers robust, frictionless integrated payments to support B2B transactions through its next-generation payments platform.

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12:25 PM – 12:45 PM

The Evolution of B2B eCommerce

**THEA19**

Commercebuild

CPE Credits: 0

B2B eCommerce is rapidly changing. Driven by B2C, client expectations of what B2B eCommerce can deliver have never been higher. Attend this session to see how B2B eCommerce is evolving and how Commercebuild can extend your clients' Sage X3 system to the digital world.

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1:30 PM – 2:30 PM

Do you Want to Build a Relationship with Sales Directors Across Your Base? There's an App for That!

**SPON06**

Skynamo

CPE Credits: 0

In this session, learn 1) why Finance and Sales teams are often at odds 2) how an app can help them get along by bridging the gap between ERP and CRM systems 3) how Skynamo can unlock new revenue streams for your business and increase customer retention.

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2:45 PM – 3:45 PM

Fuel Growth Potential – Drive Recurring Revenue and Customer Loyalty with Prophix CPM for Sage

**SPON07**

Prophix Software

CPE Credits: 0

As a Sage Intacct and Sage X3 Rockstar Partner, Prophix seamlessly integrates with Sage to streamline financial processes resulting in time saved, improved resource management, and more time for strategic analysis. In this session, we will discuss how to expand on the functionality available to customers and strengthen the foothold for Sage and its partners. Learn to recognize available opportunities and new revenue streams and see a live product demonstration.

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3:50 PM – 4:10 PM

Working with PwC as part of the partner ecosystem

**THEA23**

PwC

CPE Credits: 0

Are you a Sage partner interested in winning and delivering Sage X3 business with PwC, come hear how we can complement each other and work together to successfully transform our clients' businesses and exceed their expectations. We will also share case studies of where we have worked with Sage partners to date.

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4:15 PM – 4:35 PM

erpCommerce™: Winning with Sage ERP & Magento eCommerce

**THEA26**

Net at Work

Leveraging the power of Gartner Magic quadrant leading eCommerce platform Magento (An Adobe Company) and Gartner Magic quadrant leading iPaaS solution Boomi (a Dell Technologies Business), erpCommerce™ by Pixafy (a Net at work sister company) enables companies to launch a fully ERP integrated and transactional B2B AND B2C website in 90 days or less, on platforms that enable limitless extensibility, scalability, and flexibility as their digital businesses grow and evolve into the future. Visit Booth G8.

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4:45 PM – 5:45 PM

People, Processes, and Pitfalls: How Sales Impacts Your Digital Transformation

**SPON08**

Zoom info

Let's face it: your sales process is broken. The research done by the DiscoverOrg and ZoomInfo sales teams almost guarantees it. They've been there too. Before you invest another dime, hear lessons learned from the trenches on how to build a world-class sales organization.

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Wednesday, 4 March

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11:00 AM – 11:20 AM

Why Data is the Maestro of  
Sales Orchestration

[THEA32](#)

[Zoom info](#)

For sales processes to work, reps need to hit the right notes at the right time. This includes marrying data quality, depth, and coverage with intent and opportunity data. Learn how to leverage behavioural insights and ideal buying conditions - like funding and personnel changes - to time a harmonious prospecting symphony.

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