

sage Partner Summit

Perform at your best

Breakout sessions on the topics you care about most.

Sage Intacct

- [Technical](#)
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Sage People

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Sponsor Sessions

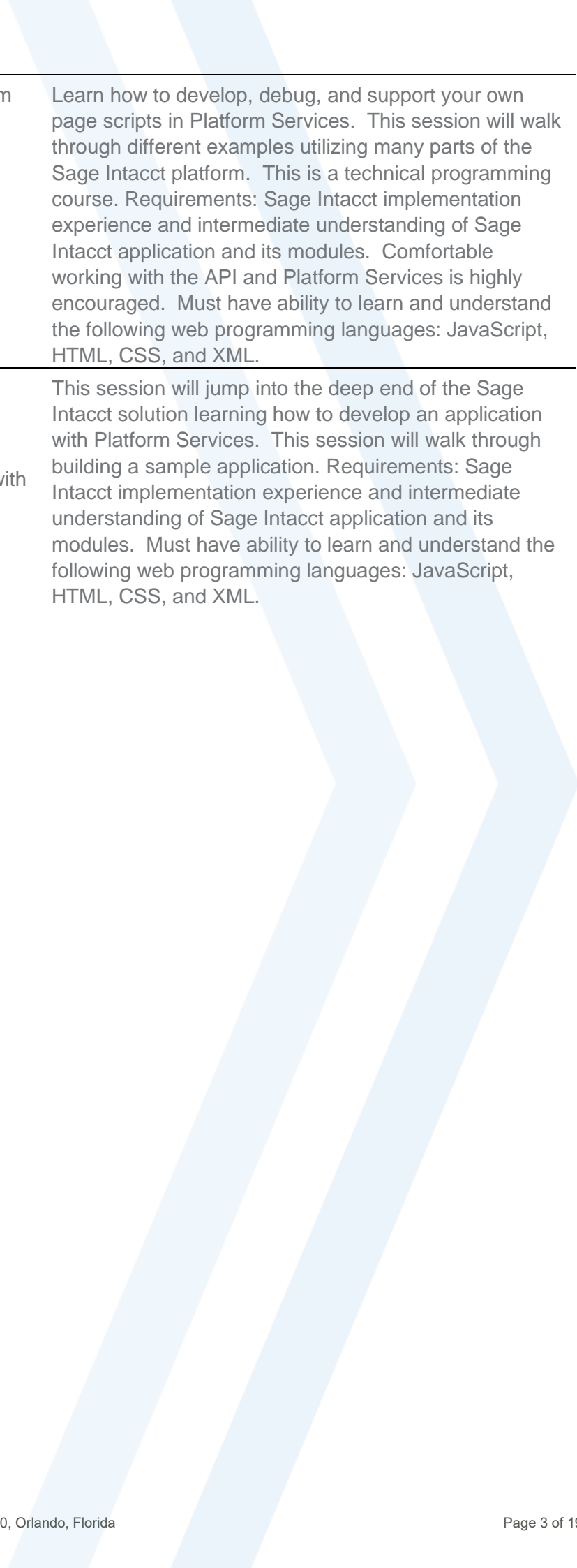
- [Sage Intacct](#)
- [Sage X3](#)

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
Contracts: Advanced Use Case Solutions cont. (invite only)	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
Sage Intacct Technical Essentials	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.
Next Level Custom Documents	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.



Page Scripting in Platform Services	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.
Develop an Application with Platform Services	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
Implementation Bootcamp	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.
Contracts: ACP and Implementation Management	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
Contracts: Advanced Use Case Solutions cont. (invite only)	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
Become the Ruth/Brady/Jordan/Gretzky of Scope	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.

Top 10 Most Perplexing Implementation Mistakes & How to Avoid	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.
Innovating at Every Stage Services Roundtable	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.
Take your Customers Further Leveraging our NPS Program	Better understand our channel Net Promoter program and identify at-risk customers early using our mid-year Sage Intacct review process.
Case and Escalation Management	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.

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
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.
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.
Effective ROI Strategies	We'll share simple explanations and easy to use methods that will help you introduce ROI with confidence into all your active opportunities.
Channel Chat: Best Practices in Sales and Marketing	From standard best marketing practices to the role of social media in sales, join us for a robust discussion about sales and marketing best practices and success in 2020.
Close Deals Faster with Internal Closing Plans and Mutual Plans	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.
Marketing and Sales Metrics	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.
Add Deals to your Pipeline using the Sage Intacct Marketing Stack	Learn how the Sage Intacct marketing stack is helping partner salespeople identify hot leads that are quickly converting into qualified opportunities.

Building Your Value Strategy - Effective Techniques for Holding the Line on Discounting	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.
Sage Intacct Competitive Session: All You Need to Know to Win against the Competition	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.
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.
Own your Own Success	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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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
The New Buyer's Journey	How do Partners respond to the New Buyer's Journey? Hear from partners on how they use technology, customer stories to educate their prospects.
How to Leverage Sage Intacct Marketing Technologies and Resources to drive your campaign success	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!
Channel Chat: Best Practices in Sales and Marketing	From standard best marketing practices to the role of social media in sales, join us for a robust discussion about sales and marketing best practices and success in 2020.
Webinars and Dimensional Mailings – Two Top Tactics for Generating Leads and Opportunities	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.
Marketing and Sales Metrics	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.
Customers for Life- 7 Things You should be Doing In Customer Marketing	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.

Building Your Value Strategy - Effective Strategies for Holding the Line on Discounting	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.
The Referral Marketing Survival Guide	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.
What To Do When you Don't have an SDR to Follow Up on Leads?	We know that partners are more successful if they can 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.
Top 5 Things Every Partner Needs to Know about Driving Sales and Marketing Success	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 five marketing investments partners made this year to drive opportunity growth.

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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
Opportunity Creation Best Practices	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.
How to Effectively Lead a Multi-Salesperson Sales Team	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.
Be a Demo Rockstar - Advanced Demo Techniques That Improve Close Rates	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.
Advanced Demo Techniques That Improve Close Rates	Learn from the best demo jockeys in the Sage Intacct ecosystem. See 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.
Learn How to Compete in the Advanced Competitive Landscape	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.
Advanced Sales Workshop	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.

Advanced Marketing Workshop	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.
Sales Development - How To Build It Into Your Marketing and Sales Strategy	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.
Understanding the value of Working with Marketplace Partners	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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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
It All Starts with a Great Plan	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.
Referral Marketing, the #1 Activity	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.
Raise your Sales Game	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!
Winning Larger Engagements with Higher Profits	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!
It's All About the Value	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!

State of the Accounting Profession	Join Erik Asgeirsson, CEO of CPA.com (the business and technology arm of the AICPA) for an exclusive update on the major forces and issues currently driving change in the accounting profession.
There is no I in TEAM	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.
You Can't Sell if you Don't Close	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?
Ensuring Long Term Customer Success	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.
Marketing that Actually Works	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.

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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
Sage People Partner Programme	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.
Build a healthy sales pipeline with Sage People	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.
Become a Sage People expert	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.
Sage People implementation 101	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.
	Discover how the results Sage People helps produce, like increasing HR productivity by up to 80% by eliminating labour-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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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
A/R & E-Com Payments Automation: Increase Cash Flow and Reduce Operating Costs (Theatre presentation)	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.
2C Processor	
GUMU Cloud: One Stop Solution for All Integrations (Theatre presentation)	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 in the last 20 years taking the example of Salesforce.com integration.
Greytrix	
Expensify + Sage Intacct: End-to-End Automation (Theatre presentation)	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.
Expensify	
Driving growth in facilities services & assets (Theatre presentation)	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.
KloudGin	

<p>The only integrated payments into Sage X3 and Sage Intacct (Theatre presentation)</p> <p>Paya</p>	<p>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.</p>
<p>Driving the Future of Work (Theatre presentation)</p> <p>ADP</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>
<p>Supercharge Your FP&A Processes with Vena and Sage Intacct! (Theatre presentation)</p> <p>Vena Solutions</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&A cloud solution from Vena.</p>
<p>Transforming business strategy through AP automation with Sage Intacct (Theatre presentation)</p> <p>AvidXchange</p>	<p>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.</p>


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Sponsors Sessions

Engage in sessions that will enable your business growth and increase revenue significantly with Sage Enterprise Intelligence. Be ready for your customers' needs and build their confidence with cloud ready advanced analytics while driving new revenue opportunities, including new customer acquisitions. Learn more about achieving delivery, quality and financial goals relies on the effectiveness of your resources and getting the most from your employees and machines by using technology that can automate data collection and optimise workflow, to seamlessly connect planning and production activities. Discover how to manage core business processes, providing secure real-time card, and ACH acceptance, and accelerate business growth, streamline payment processing, and run an agile organization.

Audience: Sage X3 Partners

Title	Abstract
Seamlessly combine Cloud Business Analytics and Data Management with Sage Enterprise Intelligence V9 Tangerine Software	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.
Growing your revenue opportunities with Sage Enterprise Intelligence V9 – Cloud, ETL, BI (Theatre presentation) Tangerine Software	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.
GUMU Cloud: One Stop Solution for All Integrations (Theatre presentation) Greytrix	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 in the last 20 years taking the example of Salesforce.com integration.
Plug and play MES software to drive performance (Theatre presentation) LYNQ	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.



The only integrated payments into Sage X3 and Sage Intacct (Theatre presentation)	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.
Paya	

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