

Sage Partner Summit

# Workshop Sessions Listing

Sage Intacct

- [Preconference](#)
- [Technical](#)
- [Implementation services](#)
- [Sales](#)
- [Marketing](#)
- [Customer account management](#)
- [Sage Intacct accountant program partners](#)

Sage Construction and Real Estate (CRE)

- [View Track](#)

Sage X3

- [Preconference](#)
- [Strategy and sales](#)
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Cloud Acceleration

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Specialized Solutions Group

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BMS Migration to Cloud

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[Bringing it all together](#)

**Sage Intacct Preconference**

Exclusive to Sage Intacct partners (limited capacity)

Sage  
Partner Summit

## Tuesday, June 7

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- 10:00 AM  
3:00 PM
- Sage Intacct SDR training**  
The Sage Intacct SDR Training focuses on Sales Funnel Management and will cover account research, 6Sense account intelligence, cadence strategy for lead follow-up, and BANT for lead conversion. Sage Intacct partners involved in marketing or sales funnel management will benefit from the training.
- 10:00 AM  
2:00 PM
- Sage Intacct marketing bootcamp**  
Struggling to execute effective marketing that produces highly qualified leads for sales? Join marketing experts and learn practical strategies to boost marketing efforts including how to create a solid marketing plan, use compelling content, and identify the right tactics to deploy to convert more leads to opportunities.
- 9:00 AM  
3:00 PM
- Sage Intacct value prop**  
This workshop will cover top areas of value, including Return on Investment (ROI) vs. Return on Time (RoT) and topics derived from customer case studies. Attendees will create and deliver a value-based sales presentation for a current prospect.
- 10:00 AM  
2:00 PM
- Sage Intacct - Starting with Sage Intacct Planning**  
New to, or at a beginner level of Sage Intacct Planning? Attend this session and walk away with a complete understanding of how your customers can benefit from SIP. Topics include market opportunity, building a planning practice, turning a SIP stand-alone deal into a Sage Intacct deal, and first-hand experiences from your peers and much more! The session also includes a hands-on workshop where attendees will build a budget and experience the intuitive and self-discoverable aspects of working with SIP.

Note: Sessions and schedule are subject to change.

## Sage Intacct technical track

Designed for Sage Intacct partners with staff in or wanting to move into a developer/technical role. The track is for those experienced with Sage Intacct and will include web technologies and light programming. Attendees will learn to troubleshoot platform services, API and integration considerations, and much more.

### Exclusive to Sage Intacct partners

Audience: Sage Intacct partner software developers and business analysts

## Tuesday, June 7

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3:15 PM  
4:00 PM INAL01 - Sage Intacct Partner Channels – A look back and a look forward

## Wednesday, June 8

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11:15 AM  
12:00 PM INTE01 - Introduction to Page Scripting

1:15 PM  
3:15 PM INTE02 - Advanced Printed Document Templates (hands-on training)

3:30 PM  
4:30 PM INTE03 - Introduction to Sage Intacct API

4:45 PM  
5:30 PM INTE04 - Setting up Advanced CRM Automation

## Thursday, June 9

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11:15 AM  
12:00 PM INTE05 - Harnessing the power of the Sage Intacct platform and beyond

1:15 PM  
3:15 PM INTE06 - Intro to Smart Events and Smart Rules (hands-on training)

3:30 PM  
5:30 PM INTE07 - Advanced Smart Events and Smart Rules (hands-on training)

## Friday, June 10

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09:45 AM  
10:45 AM INAL02 - A seamless new vendor payment experience from Sage Intacct: Vendor Payments powered by CSI

11:00 AM  
12:00 PM Bringing it all together workshop

Note: Sessions and schedule are subject to change.

## Sage Intacct Implementation services track

Designed for new and experienced implementation staff, this track offer curriculum for individuals new to the Sage Intacct family as well as deep-dive product training opportunities for experience implementers. Workshops provide deep knowledge and expertise around project management in the SaaS world, planning techniques used for successful implementations, and techniques that result in happy and successful partners and customers.

### Exclusive to Sage Intacct partners

Audience: Sage Intacct implementation consultants and solution consultants

#### Tuesday, June 7

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3:15 PM  
4:00 PM INAL01 - Sage Intacct Partner Channels – A look back and a look forward

#### Wednesday, June 8

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11:15 AM  
12:00 PM INIM01 - Processing with Projects

1:15 PM  
2:15 PM INIM02 - Small tricks with big impacts

2:30 PM  
3:15 PM INIM03 - It's the Endgame now: Don't worry, you have help

3:30 PM  
4:30 PM INIM04 - Allocated and reviewed: When Dynamic Allocations and ICRW team up

4:45 PM  
5:30 PM INIM05 - Leveraging Power Query in Excel to automate data imports into Sage Intacct

#### Thursday, June 9

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11:15 AM  
12:00 PM INIM06 - Implementing crypto currency in Sage Intacct

1:15 PM  
2:15 PM INIM07 - Sage Intacct vertical collaborations round tables

2:30 PM  
3:15 PM INIM08 - Partnering with product: How to advocate for change within Sage Intacct

3:30 PM  
4:30 PM INIM09 - Transaction definition adventure - What's in your workflow?

4:45 PM  
5:30 PM INIM10 - How to make Your clients SOX-essful

#### Friday, June 10

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9:45 AM  
10:45 AM INAL02 - A seamless new vendor payment experience from Sage Intacct: Vendor Payments powered by CSI

11:00 AM  
12:00 PM Bringing it all together workshop

Note: Sessions and schedule are subject to change.

## Sage Intacct sales track

This track combines the best of the best across Sage Intacct Sales execution and knowledge.

### Exclusive to Sage Intacct partners

Audience: Sage Intacct CEOs and sales

## Tuesday, June 7

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3:15 PM  
4:00 PM INAL01 - Sage Intacct Partner Channels – A look back and a look forward

## Wednesday, June 8

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11:15 AM INSA01 - Selling to win  
12:00 PM  
1:15 PM INSM01 - Forecasting for Sage FY23 and your business  
2:15 PM (Joint session: Sales and Marketing)  
2:30 PM INSM02 - Developing referral relationships  
3:15 PM (Joint session - Sales and Marketing)  
3:30 PM INSMC01 - Marketo and 6Sense for sales, renewals, add ons and marketing  
4:30 PM (Joint session: Sales, Marketing, Customer Account Management)  
4:45 PM INSM03 - How to use video to enhance your sales and marketing efforts  
5:30 PM (Joint session: Sales and Marketing)

## Thursday, June 9

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11:15 AM INSA02 - Competitive selling  
12:00 PM  
1:15 PM INSA03 - Migration selling  
2:15 PM  
2:30 PM INSA04a - Partner sales cycles: session 1  
3:30 PM  
2:30 PM INSA04b - Partner sales cycles : session 2  
4:30 PM  
4:45 PM INSA05 - Scoping and quoting implementation services  
5:30 PM

## Friday, June 10

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09:45 AM INAL02 - A seamless new vendor payment experience from Sage Intacct: Vendor  
10:45 AM Payments powered by CSI  
11:00 AM  
12:00 PM Bringing it all together workshop

Note: Sessions and schedule are subject to change.

## Sage Intacct marketing track

This track combines the best of the best across Sage Intacct Marketing execution and knowledge.

### Exclusive to Sage Intacct partners

Audience: Sage Intacct CEOs, sales, and marketing

### Tuesday, June 7

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3:15 PM  
4:00 PM INAL01 - Sage Intacct Partner Channels – A look back and a look forward

### Wednesday, June 8

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11:15 AM  
12:00 PM INMA01 - Putting SEO to work for you

1:15 PM INSM01 - Forecasting for Sage FY23 and your business  
2:15 PM (Joint session: Sales and Marketing)

2:30 PM INSM02 - Developing referral relationships  
3:15 PM (Joint session - Sales and Marketing)

3:30 PM INSMC01 - Marketo and 6Sense for sales, renewals, add ons and marketing  
4:30 PM (Joint session: Sales, Marketing, Customer Account Management)

4:45 PM INSM03 - How to use video to enhance your sales and marketing efforts  
5:30 PM (Joint session: Sales and Marketing)

### Thursday, June 9

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11:15 AM  
12:00 PM INMA02 - Leveraging Sage Intacct's free marketing

1:15 PM  
2:15 PM INMA03 - Migration marketing strategies

2:30 PM  
3:15 PM INMA04 - Leveraging outsourced marketing resources

3:30 PM  
4:30 PM INMA05 - Marketing tools I can't live without

4:45 PM  
5:30 PM INMA06 - Marketing greatest hits

### Friday, June 10

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09:45 AM  
10:45 AM INAL02 - A seamless new vendor payment experience from Sage Intacct: Vendor Payments powered by CSI

11:00 AM  
12:00 PM Bringing it all together workshop

Note: Sessions and schedule are subject to change.



## Sage Intacct customer account management track

This track combines the best of the best across Sage Intacct customer account management execution and knowledge.

### Exclusive to Sage Intacct partners

Audience: Sage Intacct sales and business development

### Tuesday, June 7

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3:15 PM  
4:00 PM INAL01 - Sage Intacct Partner Channels – A look back and a look forward

### Wednesday, June 8

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11:15 AM  
12:00 PM INCA00 - Customer Account Management - Opportunities and responsibilities

1:15 PM  
2:15 PM INCA01 – Renewals

2:30 PM  
3:15 PM INCA02 - Strategic account management

3:30 PM  
4:30 PM INSMC01 - Marketo and 6Sense for sales, renewals, add ons and marketing (Joint session: Sales, Marketing, Customer Account Management)

4:45 PM  
5:30 PM INCA03 - Transform/customer meetups/customer events

### Thursday, June 9

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11:15 AM  
12:00 PM INCA04 - Add-on sales strategies

1:15 PM  
2:15 PM INCA05 – Managing customer challenge

2:30 PM  
3:15 PM INCA06 – Working with your partner success manager

3:30 PM  
4:30 PM INCA07a - Owners Only: Investment and strategy for growing your business (session 1)

4:45 PM  
5:30 PM INCA07b - Owners Only: Investment and strategy for growing your business (session 2)

### Friday, June 10

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09:45 AM  
10:45 AM INAL02 - A seamless new vendor payment experience from Sage Intacct: Vendor Payments powered by CSI

11:00 AM  
12:00 PM Bringing it all together workshop

Note: Sessions and schedule are subject to change.

## Sage Intacct Accountants Program (SIAP)

Learn best practices from your peers and the Sage team of experts on winning strategies to help drive accelerated growth and build a thriving SIAP CAS practice.

### Exclusive to Sage Intacct partners

Audience: Sage Intacct Accountant partners (CPE eligible)

### Tuesday, June 7

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3:15 PM  
4:00 PM INAL01 - Sage Intacct Partner Channels – A look back and a look forward

### Wednesday, June 8

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11:15 AM  
12:00 PM INSI01 - Sage Intacct Accountants Program (SIAP) opening session

1:15 PM  
2:15 PM INSI02 - Moving upmarket to achieve greater client satisfaction and increase profits

2:30 PM  
3:15 PM INSI03 - Building an effective referral network

3:30 PM  
4:30 PM INSI04 - Strategies for closing more business and reducing implementation times

4:45 PM  
5:30 PM INSI05 - How to maximize the lifetime value of your clients

### Thursday, June 9

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11:15 AM  
12:00 PM INSI06 - Everything you need to know about SB3

1:15 PM  
2:15 PM INSI07 - Solve your capacity and capability challenges with the SIAP Authorized Services Partner Program

2:30 PM  
5:30 PM INSI08 - Exploring the challenges and opportunities of a SIAP practice

### Friday, June 10

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09:45 AM  
10:45 AM INAL02 - A seamless new vendor payment experience from Sage Intacct: Vendor Payments powered by CSI

11:00 AM  
12:00 PM Bringing it all together workshop

Note: Sessions and schedule are subject to change.

## Sage CRE track

Audience: Sage Construction and Real Estate (CRE) partners

### Wednesday, June 8

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11:15 AM 12:00 PM	CRE01 - Sage field operations for Sage Intacct
1:15 PM 2:15 PM	CRE02 - Sage Intacct Construction Payroll
2:30 PM 3:15 PM	CRE03 - Sage Intacct Real Estate
3:30 PM 4:30 PM	CRE04 - Sage Intacct Construction R2 review and roadmap
4:45 PM 5:30 PM	CRE05: Sage Intacct Construction partner enablement 2.0

### Thursday, June 9

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11:15 AM 12:00 PM	CRE06 - Sage Estimating and marketplace solutions for construction
1:15 PM 2:15 PM	CRE07 - Getting over the hump - Sage Intacct construction success
2:30 PM 3:15 PM	CRE08 - Construction partner marketing and loyalty program

### Friday, June 10

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11:00 AM 12:00 PM	Bringing it all together workshop
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Note: Sessions and schedule are subject to change.

## Sage X3 Preconference

Session capacity limit: 30

### Audience:

This course is designed for developer consultants.

### Tuesday, June 7

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10:00 AM      PCX301 – Experience using Sage X3 Automated Test Platform  
4:00 PM      (ATP), hands-on session

In the Cloud, testing your developments has become mandatory to deploy regular updates and minimize risks of regressions. Attend this hands-on class to learn how to use the Sage X3 Automated Test Platform to automate this process, reducing time spent regression testing on standard, vertical or add-on updates, and upgrades.

After attending participants will be able to:

- Design an ATP baseline
- Define and build test scripts
- Trigger testing on code commit automatically
- Build a fully configured platform for non-regression testing

Prior to attending, participants must complete the following prerequisites:

- Attend eLearning courses:
  - Introduction to Sage X3 Automated Test Platform
  - Installing and Configuring Sage X3 Automated Test Platform
- Review provided documentation

Laptop required.

Note: Sessions and schedule are subject to change.

## Sage X3 strategy and sales track

Workshops in the Sage X3 Sales and Strategy track focus on the market opportunity for product centric business, including market differentiators and tactics, and the investment strategy to ensure Sage X3 remains a growth engine for Sage and Sage partners.

Audience: Sage X3 partner pre-sales, sales, marketing, and business development representatives

### Wednesday, June 8

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11:15 AM 12:00 PM	X3AL01 - Sage X3: A year in action
1:15 PM 2:15 PM	X3SS01 - Sage X3: The art of the demo
2:30 PM 3:15 PM	X3SS02 - Sage X3: Where and how we win
3:30 PM 4:30 PM	X3SS03 - Sage X3 strategy

### Thursday, June 9

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11:15 AM 12:00 PM	X3SS05 - Sage X3 industry marketing
1:15 PM 2:15 PM	X3SS06 - Sage X3 cloud strategy
2:30 PM 3:15 PM	X3SS07 - Sage X3: Building capabilities and capacity to drive your growth
3:30 PM 4:30 PM	X3SS08 - Sage X3: Rapid deployment
4:45 PM 5:30 PM	X3SS09: sedApta - Smart Manufacturing made easy

### Friday, June 10

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09:45 AM 10:45 AM	X3AL02 - Sage X3 roadmap
11:00 AM 12:00 PM	Bringing it all together workshop

Note: Sessions and schedule are subject to change.

## Sage X3 Product and technical track

Workshops in the Sage X3 Product and Technical track are designed to demonstrate Sage X3 features that have been delivered since we last met, including insights into future roadmaps. These sessions will offer technofunkies interactive hands-on opportunities.

Audience: Sage X3 partner pre-sales/solutions engineers, sales, consultants and customer services

### Wednesday, June 8

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11:15 AM 12:00 PM	X3AL01 - Sage X3: A year in action
1:15 PM 2:15 PM	X3PT01 - Sage X3: Integration, Cloud and how GraphQL changes the landscape of integration
2:30 PM 3:15 PM	X3PT02 - Sage X3: Future of digital manufacturing
3:30 PM 4:30 PM	X3PT03 - Sage X3 lab: Let's build together a real case of integration based on GraphQL for Sage X3

### Thursday, June 9

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11:15 AM 12:00 PM	X3PT05 - Sage X3: Laser focus on performance optimization
1:15 PM 2:15 PM	X3PT06 - Sage X3: Helping customers thrive
2:30 PM 3:15 PM	X3PT07 - Sage X3: Simply staying up to date
3:30 PM 4:30 PM	X3PT08 - Sage X3: From the warehouse to the shop floor
4:45 PM 5:30 PM	X3PT09 - Key elements for a secure Sage X3

### Friday, June 10

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09:45 AM 10:45 AM	X3AL02 - Sage X3 roadmap
11:00 AM 12:00 PM	Bringing it all together workshop

Note: Sessions and schedule are subject to change.

## Cloud Acceleration track

Series of impactful, instructional sessions with actionable material delivered by Forrester consultants and research analysts, Tellus International and additional industry experts. Derived from SaaS best practices, the sessions focus on aligning business priorities with customer needs to scale and grow with Sage. Each session will be delivered to complement the day's Super Session, master session, and go-to-market strategies.

Audience: Open to all Sage partners

### Wednesday, June 8

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11:15 AM 12:00 PM	CLOU01: Tools and frameworks to build your SaaS business model (session 1)
1:15 PM 3:15 PM	CLOU02: Forrester: Buyers Journey and Customer Lifecycle - a detailed understanding
3:30 PM 5:30 PM	CLOU03: AWS: Digital Innovation workshops (sessions 1 and 2)

### Thursday, June 9

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11:15 AM 12:00 PM	CLOU04: Forrester: Continuous releases, continuous marketing
2:30 PM 3:15 PM	CLOU06: Forrester: master what you measure
3:30 PM 4:30 PM	CLOU07: Tellus: Tools and frameworks to build your SaaS Business Model (session 2)
3:30 PM 4:30 PM	CLOU10- Key ingredients to enable innovation in your organization!
4:45 PM 5:30 PM	CLOU08: Forrester: personalized marketing

### Friday, June 10

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09:45 AM 10:45 AM	CLOU09 - Tellus and partner panel: Working with business modelling tools and frameworks
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Note: Sessions and schedule are subject to change.

## Specialized Solutions Group (SSG) track

Looking for opportunities to grow and expand your business? How can you gain a foothold into a client you are positioning a Sage ERP solution? Look no further than the Specialized Solutions Group (SSG) at Sage. Discover how the Sage Fixed Assets solution, Sage Human Resource Management System (HRMS) and Sage Payroll solutions, and Sage CRM all provide excellent opportunities to grow your business.

Audience: Open to all Sage partners

### Wednesday, June 8

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1:15 PM  
2:15 PM      SSG01 - Ditch the spreadsheets with Sage Fixed Assets

### Thursday, June 9

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11:15 PM  
12:00 PM      SSG02 - Employee Self Service and Payroll for the future with Sage HRMS

3:30 PM  
4:30 PM      SSG03 - Sage CRM to drive revenue and lifetime value

Note: Sessions and schedule are subject to change.



## Business Management Solutions (BMS) migration to cloud track

The sessions in this track focus on how to identify key customer accounts that are ready to move to the cloud and how to start the conversation. Learn how to find the right solution for your customer, whether it is Sage Partner Cloud or Sage Intacct.

Audience: Sage Business Management Solutions (Sage 100, Sage 200, Sage 300) partners migrating to cloud solutions

### Wednesday, June 8

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11:15 AM 12:00 PM	BMS01 - Fireside Chat with Nancy Teixeira: Partners sharing successes with migrating customers to the cloud
2:30 PM 3:15 PM	BMS02 - Sage Partner Cloud Certification: Everything you need to know to get certified
3:30 PM 4:30 PM	BMS03 - Segmenting your customer base to bring them the most value
4:45 PM 5:30 PM	BMS04 - Requirements for becoming a Sage Intacct partner

### Thursday, June 7

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1:15 PM 2:15 PM	BMS05 - Sage 100: A look ahead
2:30 PM 3:15 PM	BMS06 - Sage 300: A look ahead

### Friday, June 10

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11:00 AM 12:00 PM	Bringing it all together workshop
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Note: Sessions and schedule are subject to change.

## Bringing it all together

We will conclude Sage Partner Summit 2022 with a workshop hosted by your Sage regional leadership team. You will not want to miss the opportunity to hear insights on how you can impact your business with key learnings from this year's event. Engage in lively discussions on conference highlights and key takeaways.

Audience: All partners

### Friday, June 10

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11:00 AM 12:00 PM	BTIT00: Bringing it all together - Sage partners (Rest of world)
11:00 AM 12:00 PM	BTUK00: Bringing it all together - Sage partners (UKI)
11:00 AM 12:00 PM	BTCA00: Bringing it all together - Sage partners (Canada)
11:00 AM 12:00 PM	BTUS00: Bringing it all together - Sage partners (US)

Note: Sessions and schedule are subject to change.