

# Call for Speakers Offline Worksheet

Please review all [guidelines](#) prior to submission. We recommend that you first fill out this offline worksheet, and then use this to guide your responses to the online submission form. This option is the best approach to avoid losing your valuable work and information.

You must enter your session information via the online submission form to formally apply to speak at Sage Transform. We will not accept this document as a session submission. If you have any questions, please don't hesitate to contact us at [speakers.sagetransform@sage.com](mailto:speakers.sagetransform@sage.com).

## Session Information

\*=Required

### Title\*

(must be 75 characters or less - with spaces)

Your title should clearly state what your session is about. Need some inspiration? Review [these examples](#) of titles we've seen perform well at past events.

### Description\*

(must be 750 characters or less - with spaces)

Remember: Your description is what attracts attendees to your session, so be detailed! Be sure to write with the attendee in mind, addressing how they will benefit from attending and ensuring sure your description and takeaways align. [See examples here](#).

## Track\* (choose one)

- Admin and Developer:** These sessions are designed for Administrators and Developers who are responsible for, or manage activities, such as customizing, extending, integrating, and securing Sage products.
- Budgeting and Planning:** These sessions are broadly applicable and focus on new capabilities, best practices, and customer success with the Sage Intacct Planning solution.
- Business Leadership:** These sessions cover cross-industry trends and leadership perspectives to help Business Leaders tackle their companies', their people's, and their role's most compelling challenges with technology. Insights will be shared to help attendees adapt to strategic shifts in the market in new ways, leveraging the strength of available resources: people, process, and technology.
- Construction and Real Estate:** These sessions focus on leveraging Sage Intacct Construction to efficiently manage the complex demands of construction financial management.
- Core Financials:** These sessions are broadly applicable and focus on new capabilities, best practices, and customer success with the Sage Intacct core accounting platform.
- Financial Services:** These sessions focus on core business issues faced by financial services organizations including wealth & asset management, real estate, insurance, lending, and financial technology firms.
- Healthcare:** These sessions are focused on business issues for a broad range of healthcare organizations.
- Hospitality:** These sessions are focused on business issues for multi-property hotels, resorts, restaurants, entertainment venues, clubs, and all other hospitality industry businesses.
- Nonprofit:** These sessions are designed to address a variety of topics around the use of Sage Intacct within nonprofit organizations including workflows, reporting, and best practices.
- Projects and Services:** These sessions provide the pathway to project profit success through project-based accounting, reporting and invoicing with Sage Intacct.
- Reporting and Insights:** These sessions focus on leveraging Sage products to drive insight generation and reporting of your business performance.
- Software and Subscription Management:** These sessions are designed for customers who are in the software and SaaS industries and who are managing a subscription business model.
- Supply Chain Management:** These sessions are designed for customers that leverage the Purchasing, Inventory, Order Management and Distribution modules of Sage Intacct.

### Product\* (multi-select)

- Sage Intacct
- Sage Intacct Budgeting and Planning
- Sage Intacct Construction
- Not product-related

### Intended Audience\* (choose one)

- Financial manager or staff
- Financial planning
- HR manager or staff
- Administrator
- Developer
- C-level/Business Leader
- All audiences

### Session Type\* (choose one)

- Breakout Session:** Most of these sessions feature PowerPoint slides and live demos as well as audience engagement through questions, group discussions, polls and games.
- Panel Discussion:** A one-hour moderated session with experts sharing best practices, lessons learned, and other insights. A significant portion of the session is dedicated to Q&A and audience engagement.
- Lightning Talk:** A pre-recorded video or audio presentation (15-minute max) focused on thought leadership or tips, tricks and best practices for working in the product.

*If you chose "Breakout Session" or "Panel Discussion" as your session type, please answer the below questions. If you chose "Lightning Talk," please skip these and move on to the "Speaker" section.*

**Session Level\* (choose one)**

Answer only if *Breakout Session* or *Panel Discussion*

**Introductory:** Intended for a beginner-level audience. No prior knowledge of the product or the topic is needed for a full understanding of the session content.

**Intermediate:** Intended for a more experienced audience. These sessions assume a solid knowledge of the product or a foundational knowledge of the topic.

**Advanced:** Intended for a very experienced audience. These sessions assume expertise of the topic and focus on the intricacies of the topic.

**Learning Objectives\***

Answer only if *Breakout Session* or *Panel Discussion*

What are three main things an attendee will learn from your session?

**Demo Description**

(must be 750 characters or less – with spaces)

Answer only if *Breakout Session*

Describe any proposed demos you will be performing during your presentation. This should include a detailed description of your demo(s), including products, topics and approximate duration.

**Provide a list of questions or question topics to be included in the discussion\***

Answer only if *Panel Session*

**Provide a list of panelists/companies you are considering for this session\***

*Answer only if Panel Session*

## Proposed Speakers

For breakout and panel sessions, a minimum of one primary speaker (or moderator for panel sessions) is required with each submission. A secondary speaker can be added for breakout sessions. Lightning Talk submissions are limited to one primary speaker.

### Participant Role\* (choose one)

- Primary Speaker:** Applicable for Breakout Session & Lightning Talk (limit of 1 per Lightning Talk)
- Secondary Speaker: Applicable for Breakout Session
- Moderator:** Applicable for Panel Discussion (limit of 1 per panel discussion)

### What is your primary relationship to Sage?\* (choose one)

If multiple channels, pick the option that best describes your relationship, with your submission topic in mind.

- Customer
- Partner (VAR)
- Partner (SIAP)
- Partner (MPP)
- Sage/Sage Intacct Employee

**First Name\*:**

**Last Name\*:**

**Business Email\*:**

**Job Title\*:**

**Company\*:**

Sage  
Transform

**Speaker Bio\***

If accepted, your speaker bio will be shared in the Session Catalog. Your bio should lend credibility to your session topic and highlight career or educational experiences, awards, etc. and should not describe your company's products or services.