

# Sage Summit San Diego

## Thursday, February 14, 2019

Times	Agenda Item
7:30 – 9:00 AM	Registration, Continental Breakfast and Product Showcase <b>Pavilion</b>
9:00 – 10:30 AM	Welcome, Keynote and Featured Speaker <b>Grand Ballroom</b>
10:30 – 10:45 AM	Break <b>Foyer</b>

Track	Times	Title	Description
Small Business	10:45 – 11:30 AM	Sage 50cloud with MS Office 365	Discover how Sage 50cloud and Microsoft Office 365 can give you a day back every month by bringing you the flexibility and freedom of cloud and mobile access, without the disruption of losing the familiarity of the desktop solution you know and love.
Small Business	10:45 – 11:30 AM	The threats are real: Protect your business from fraud and non-compliance	How much money can your business afford to lose due to fraudulent activity and non-compliance? Small losses can have huge impacts on businesses of all sizes. Discover gaps that may exist in your business' approach to fraud prevention and compliance – and learn about products, services, and tools available through Sage Checks and Forms that are designed to help you protect against various forms of financial loss.
Medium Business	10:45 – 11:30 AM	Sage 300cloud: Tips and Tricks	Sage 300cloud has exciting features and functionality. For even the most tenured user, there's always more to learn and ways to decrease redundancy and over-orchestrated workflows. Join this tips and tricks session to learn handy shortcuts and productivity tools that will help you get the most out of your investment in Sage 300.
Medium Business	10:45 – 11:30 AM	Lessons from the field: Overcoming barriers and accelerating growth with Sage 100cloud	As companies work to navigate day-to-day complexities, it can be challenging to gain a broader perspective on how those same complexities are being successfully navigated by others. In this panel, Sage 100 Partners will discuss industry trends, providing examples of specific high impact practices that Sage 100 customers can start putting into practice today.
Partner	10:45 – 11:30 AM	Sponsored Session	Sponsored Session
Thought Leadership	10:45 – 11:30 AM	The Future Ready Finance & Accounting Professional - The Future is Now! (Part 1)	Recent research in the Profession says that the business environment for CPAs and accounting professionals will be characterized by “unprecedented, massive and highly accelerated change” through 2025. To thrive in this new era of hyper-change and growing uncertainty, it is now imperative to learn a new competency - how to accurately anticipate the future. This session will show how to understand and anticipate trends and use them to find new opportunities for your firm and your clients. You will learn how to move from being a crisis manager to an opportunity manager and see farther into the future than your competition. <ul style="list-style-type: none"> <li>Learn about the latest trends facing accounting and finance professionals.</li> <li>Identify strategies you can use to anticipate marketplace trends and develop opportunities.</li> <li>Apply the concepts of being Future Ready - Aware, Predict, Adapt to your organization and your career.</li> </ul>
Small Business	11:45 – 12:30 PM	Sage 50cloud: The Road Ahead	In this Sage 50cloud roadmap session, you get a closer look at the new features and functionality that will improve the way you and your clients work together, including: Outlook Connector, Automatic Cloud Back-ups, Cloud document storage, Sage Drive and more.
Small Business	11:45 – 12:30 PM	Driving Success: Using Effective Strategy, Goal Management and Coaching to Boost Employee Engagement	There is a direct and measurable relationship between employee engagement and an organization's success. Employees who know that they are working toward goals that drive business outcomes, as well as their own goals for professional growth and learning, develop ownership in the organization's success, which boosts employee engagement. This session will connect the dots from organizational goals to job descriptions to individual goals, will show the different goal types and measures, and will demonstrate how ongoing coaching and feedback lead to a more effective performance review process. This session will: <ul style="list-style-type: none"> <li>Show the impact of employee engagement on the bottom line (i.e., revenue) of an organization.</li> <li>Help you help your managers improve how they coach so employees can achieve their goals.</li> <li>Highlight how performance reviews are changing into ongoing performance management and coaching.</li> </ul>
Medium Business	11:45 – 12:30 PM	Evolution of Payroll   Yesterday. Today. Tomorrow.	The biggest payroll challenge that now faces organizations is compliance within a changing field of federal regulations and tax rules. Changes at the federal level are also leading to a changing field of rules and regulations at the state and provincial level which has organizations scrambling to reduce excess labor costs without laying people off. After nearly a decade of automated payroll how's a business to keep up? Join us as we explore the evolution of Payroll and how to best navigate the tumultuous Payroll landscape with grace and ease.
Medium Business	11:45 – 12:30 PM	Become a 'Data Driven Organization' With Sage Alerts and Workflow	Do you have delinquent customers, backorders due to stock shortages, or POs awaiting approval? Learn about a solution that helps you become more 'data-driven' – enabling you to avoid surprises in your business and anticipate and automate (rather than be surprised and react to) changing conditions in your daily business activities.
Partner	11:45 – 12:30 PM	Sponsored Session	Sponsored Session
Thought Leadership	11:45 – 12:30 PM	The Future Ready Finance & Accounting Professional - Application Workshop (Part 2)	The key to being Future Ready involves the right mindset, skillset, and toolset. This interactive workshop will build on Part 1 - The Future Ready Finance & Accounting Professional and focus on applying the Future Ready framework to transform your firm and clients. You will learn about developing a vision for the future, creating a winning culture and developing a learning and development strategy for yourself and your team that will make your firm Future Ready. <ul style="list-style-type: none"> <li>Learn the difference between change and transformation.</li> <li>Use the future ready framework to predict the major changes facing your firm and clients.</li> <li>Understand the research and attributes of a winning culture and apply them to your firm.</li> <li>Apply the latest research on skills to develop a strategy for the development of your people.</li> <li>Create an action plan to create the firm of the future.</li> </ul>
<b>Lunch and Product Showcase</b> <b>Pavilion</b> <b>12:30 – 1:30 PM</b>			
Small Business	1:45 – 2:30 PM	Sage 50cloud: Productivity Boosters	Whether a novice or expert, you may be ready to learn more about in-depth processing efficiencies that will help boost your productivity. This session is focused on data protection and maintenance, reporting, auditing, ways to streamline navigation and workflow, and more! Join us to explore these opportunities for your business!
Small Business	1:45 – 2:30 PM	Keys to Business Success: Customer Relationship Management	See how other Sage customers use CRM to manage their business activities from lead generation to servicing customers. In this session, learn how your accounting system, connected to the Sage CRM as part of Sage 100cloud, helps your business access customer information anytime – and how to maximize these benefits across business units including marketing, sales and customer service.
Medium Business	1:45 – 2:30 PM	Sage Fixed Assets Overview	Release 2019.1 new features The Road Ahead
Medium Business	1:45 – 2:30 PM	Myth busting Sage 100cloud: Everything you wanted to know	How much do you REALLY know about Sage 100cloud? Learn the key differences between Sage 100cloud and Sage 100, today and in the future. Find out about what the migration process looks like, and requirements for making the move. Join us for this engaging, interactive, and entertaining conversation!
Partner	1:45 – 2:30 PM	Sponsored Session	Sponsored Session
Thought Leadership	1:45 – 2:30 PM	Top User Requested Add-On: AP Automation	Sage AP Automation makes accounts payable simple and delightful. We empower accounting teams to succeed by improving visibility, eliminating data entry and streamlining manual processes. Automate your entire AP workflow in the cloud, from PO to payment.

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Track	Times	Title	Description
Small Business	2:45 – 3:30 PM	Sage 50cloud and Sage Intelligence	BI, Power BI, Big Data is all the rage now-- but what if we could show you that you don't need a powerhouse accountant or some additional piece of software to analyze your data. Empower yourself with Sage Intelligence to make better business decisions, based on up-to-date information, on the go! In this session, you'll learn how to get a quick view of how your business is doing with a suite of ready-to-use online and Excel reports—which you can easily customize or drill down into as needed. Save time. Take control. Take action!
Small Business	2:45 – 3:30 PM	Sage Manufacturing	Description to be added by January 10th.
Medium Business	2:45 – 3:30 PM	Sage 100Cloud: Gain a deeper understanding of your business's data with Sage 100 Intelligence Reporting	Save time and gain control of your data with flexible, Excel-based reports that are ready to use with your information. In this session, you'll learn about the many standard reports available to you and how you can customize them to suit your business needs. You'll also discover how to use dashboards to visually represent and consume your business's data and to identify trends.
Medium Business	2:45 – 3:30 PM	Are you ready to become a People Company?	Sage People, part of Sage Business Cloud, enables mid-size, multinational companies to manage workforces through its global, cloud HR and people system, transforming how organizations acquire, engage, manage and develop their employees. Implemented quickly and simple to use, the award-winning system increases workforce visibility, HR productivity and provides better experiences across the entire workforce.
Partner	2:45 – 3:30 PM	Sponsored Session	Sponsored Session
Partner	2:45 – 3:30 PM	Sponsored Session	Sponsored Session
Thought Leadership	2:45 – 3:30 PM	Why Put a Canary in a Coal Mine? - Measure what matters	This session is dedicated to the possibility that a firm can increase their financial performance by changing to measurements used from inwardly facing to measurements that look outside the firm. Changing these metrics is not easy as it requires firms to think differently than they have in the past. If you believe you can think a bit differently about your firm's measurement systems, you are invited to attend this conversational session facilitated by Ed Kless, Sage senior director of partner development and strategy.
Small Business	3:45 – 4:30 PM	Sage 50cloud Customer Listens	Let's talk about it! Join the Customer Listens session-- now it's time for you to talk to us. The panel of Sage 50 team members and Microsoft are here to answer your questions, listen to the enhancements you would like to see and brainstorm on what we can do better at! So come on let's sit down and chat a minute!
Small Business	3:45 – 4:30 PM	The Changing Tax Landscape for Selling Out of State	In SD v. Wayfair, Inc., the Supreme Court ruled in favor of South Dakota, granting the state authority to impose sales tax obligations on out-of-state transactions. Since then, other states started changing their laws too. What does that mean for remote sellers? Come hear from our panel, consisting of a CPA, a tax compliance automation provider, and a Sage user, about their perspectives on the changes and the challenges that every business now needs to solve.
Medium Business	3:45 – 4:30 PM	My ERP can do THAT?! Tips and Tricks for Sage 100cloud	As a well-established, feature-rich, and customizable Business Management solution, Sage 100cloud is easy enough to use out of the box, and flexible enough to adapt to the needs of individual businesses as they grow. Learn about some lesser-known features for Sage 100cloud that can make a big difference for mid-sized service, distribution, and manufacturing enterprises looking to optimize their business processes.
Medium Business	3:45 – 4:30 PM	The Data-Driven Finance Leader	From big data and network effects to the subscription economy and cloud computing, modern finance is undergoing its most fundamental transformation ever. Today, it takes a data-driven finance leader – someone who understands and embraces the promise and power of technology – to navigate this exciting, uncertain future. Attend this session and hear how Sage Intacct customers became data-driven finance leaders that proactively drove strategy and improved operations. Key Learnings: <ul style="list-style-type: none"> <li>• The technologies and skills you need to move to a digital, data-driven world</li> <li>• How to move from Finance 1.0 to Finance 2.0 and beyond</li> <li>• How to “Twitterize” your reporting and analytics</li> <li>• When you should automate and when you shouldn't</li> </ul>
Partner	3:45 – 4:30 PM	Sponsored Session	Sponsored Session
Partner	3:45 – 4:30 PM	Sponsored Session	Sponsored Session
Thought Leadership	3:45 – 4:30 PM	Sage Enterprise Intelligence	Description to be added by January 10th.

**Evening Reception**  
**4:30 – 6:00 PM**  
**Pavilion**

# Sage Summit San Diego

## Friday, February 15, 2019

Times	Agenda Item
7:30 – 9:00 AM	Registration, Continental Breakfast and Product Showcase Pavilion
9:00 – 10:00 AM	Welcome and Wall Street Journal Session Grand Ballroom
10:00 – 10:15 AM	Break Foyer

Track	Times	Title	Description
Small Business	10:15 – 11:00 AM	Sage 50cloud Multi-User and Bank Feeds – Worth the Hype?	Learn how to use Sage Drive to enable local area network (LAN) and remote employees to access your company data at the same time. Simplify the bank reconciliation process by establishing a secure online connection with your bank and downloading transaction records to the Account Reconciliation window. These two features are our most popular cloud-connected features, so if you're not using them yet, join us in this session to learn what is motivating other customers to take advantage of this cloud-connected technology!
Small Business	10:15 – 11:00 AM	Aligning Your Value Proposition to Your Clients Expectations	Accountants - Learn how to build / strengthen a profitable Advisory Practice. You will leave the session with a deeper understanding of the additional value your clients need to overcome their business challenges. You will be introduced to specific ways to transform your clients and your firm.
Medium Business	10:15 – 11:00 AM	Value, Dependability, and Openness: A cloud-connected vision and the road ahead for Sage 100cloud	Sage 100cloud is a time-tested and feature-rich solution that is helping mid-sized service, manufacturing, and distribution businesses to succeed. Join us for a conversation about how the product roadmap for Sage 100cloud is driven by a long-term vision that places value, change management, and openness at the center of its approach. Learn about how we are innovating through the development of key enhancements designed to optimize business processes at scale.
Medium Business	10:15 – 11:00 AM	HRMS - Have It Your Way!	Technology is intended to help us get bandwidth back, especially around routine tasks. Some systems are so rigid the point of diminishing return is too quickly realized. Not with Sage HRMS. Come learn how HRMS is a solution, as well as the foundation on which you can build an HR system that is as unique as your organization as you grow. In this session we will help you realize there is a right combination for you. Don't waste head count on a babysitter for your HR system.
Partner	10:15 – 11:00 AM	Sponsored Session	Sponsored Session
Partner	10:15 – 11:00 AM	Sponsored Session	Sponsored Session
Thought Leadership	10:15 – 11:00 AM	Healing Leadership	This session is dedicated to the possibility that the majority of leadership thinking is wrong as it is ultimate based on manipulation - trying to "get someone to do something." Coming to terms with this idea is difficult and not for everyone because it requires us to examine some of our most deeply held beliefs and either dismiss them or at least think differently about them. If you are interested in having a conversation about healing leadership, you are invited to attend this session facilitated by Ed Kless, Sage senior director of partner development and strategy. This material is based on the work of Howard Hansen and Steve Geske, who have presented at previous Sage Summits.
Small Business	11:15 – 12:00 PM	Make business easier in Sage 50 with new options in Payments and Banking	Join the global Sage Payments and Banking team for a look at recent additions to Sage 50 that make it easier for customers to pay you and streamline your bank reconciliations. We'll cover the benefits of these features and demonstrate how easy they are to setup and use. Looking into the future, we'll also share a few exciting ideas under consideration.
Small Business	11:15 – 12:00 PM	Sage50cloud: Tips every Customer should know about!	If you're new to Sage, there are likely hidden gems of functionality you didn't realize were available or never got around to exploring. Even if you've been using the software for a while, you may have missed some of the extras that make day to day tasks easier. Join us for this session where we'll take you behind the scenes to uncover some of the practical basics you can immediately start using to save time!
Medium Business	11:15 – 12:00 PM	Sage 300cloud: The Road Ahead	Sage 300 is one of the world's leading mid-market Business Management Solutions. Learn how Sage is continuing to invest in the core solution, what's coming up and some of the exciting recent developments with Sage 300cloud.
Medium Business	11:15 – 12:00 PM	Sage Inventory Advisor	Description to be added by January 10th.
Partner	11:15 – 12:00 PM	Sponsored Session	Sponsored Session
Partner	11:15 – 12:00 PM	Sponsored Session	Sponsored Session
Thought Leadership	11:15 – 12:00 PM	Sage 100: Thriving amidst complexity: Navigating the challenges of a growing business (Panel)	With growth comes increased complexity, and with complexity comes the need to change business processes. Sometimes the very activities that lead to early success become barriers to growth as a business matures. In this session, speakers representing manufacturing, distribution, and service industries will discuss specific challenges and share the high impact strategies that have helped them thrive.

Times	Agenda Item
12:15 – 12:30 PM	Closing Statements Pavilion
12:30 – 1:30 PM	Lunch and Product Showcase Pavilion
1:30 PM	Departure