

## CONFERENCE AGENDA

### SUNDAY, January 26, 2014

5:30 - 7:30 PM

**Registration and Welcome Reception on the Tiki Terrace**

### MONDAY, January 27, 2014

8:00 - 9:00 AM

**BREAKFAST - on the Palms Lawn & Terrace**

All Sessions on Monday are in the Palms Ballroom

9:00 - 10:30 AM

**State of SedonaOffice**

Michael Marks - Co-Founder, Perennial Software

Don Faybrick - Co-Founder, Perennial Software

10:30 - 10:50 AM

**BREAK**

10:50 AM - 12:00 PM

**WeSuite, Vivid Reports and OPT Business Services Presentations**

Tracy Larson - President, WeSuite

James Briscoe - President, Briscoe Solutions

Brad Swindell & Chris Edgar - Co-Founders, OPT Business Services

12:00 - 1:30 PM

**LUNCH - on the Palms Lawn & Terrace**

1:30 - 2:15 PM

**2014 SDM Forecast**

Presented by Mark McCourt - Publisher, SDM and Security Magazines

2:15 - 3:15 PM

**Featured Presentation: Innovative and Disruptive Technologies**

Moderator: Mark McCourt - Publisher, SDM and Security Magazines

Panelists:

Rod Coles - President, Bold Technologies

Don Faybrick - Co-Founder, Perennial Software

Steve Firestone - President, Select Security

John Galante - President, AE Ventures

John Lombardi - President and Founder, CIA Security

3:15 - 3:30 PM

**BREAK**

3:30 - 4:30 PM

**SedonaEnhancement and Partner Presentation**

Don Faybrick - Co-Founder, Perennial Software

Kathy Carter - Account Executive, SedonaOffice

6:00 - 9:00 PM

**Reception and Dinner at DaVinci's or Marco Prime**

Please look at the bottom of your namebadge for where your company is eating. D is for DaVinci's and M is for Marco Prime. The walk to the restaurants is about 1/4 of a mile. Transportation to the dinner will be provided. For transportation please use the Palms Ballroom entrance, which is behind the ballroom and wait for a vehicle.

Dinner Sponsors:



**Be sure to visit the SedonaLab. Open 12:00 - 1:30 PM and 4:30 - 5:30 PM today.**

12th ANNUAL  
**SedonaOffice® USERS CONFERENCE**

MARCO ISLAND, FLORIDA  
 JANUARY 27 - 29, 2014



**TUESDAY, January 28, 2014**

	<b>JOB MANAGEMENT</b> Royal 3 & 4	<b>CONTROLLING TYPES</b> Sentry 1 & 2	<b>MOVING THE NEEDLE</b> Sabal	<b>SEDONAOFFICE</b> Coconut	<b>IT WORKS!</b> Sentry 3	<b>WESUITE SALES BOOT CAMP</b> Sentry 4
8:00 - 9:00 AM	<b>BREAKFAST - on the Palms Terrace &amp; Lawn</b>					
9:00 - 9:50 AM	<b>Job Management Setup</b> Carolyn Johnson	<b>Rapid Learning SQL</b> Jim Mayes	<b>What is your Exit Strategy? Discussion</b> Moderator: Ron Davis, Davis Mergers & Acquisitions	<b>Service Management 1</b> Lisa Gambatese and Laurie Goodrich	<b>General Ledger Setup</b> Jim Lee, Astute Financial	<b>Keeping Your Sales Funnel Evergreen!</b> Tracy Larson, WeSuite
10:00 - 10:50 AM	<b>Job Creation</b> Carolyn Johnson	<b>Rapid Learning SQL: Next Step</b> Jim Mayes	<b>Remote Monitoring &amp; Management of IT for RMR</b> John Galante, AE Ventures	<b>Service Management 2</b> Lisa Gambatese and Laurie Goodrich	<b>General Ledger Auditing</b> Jim Lee, Astute Financial	<b>Getting the Most from Contact to Contract!</b> Tracy Larson, WeSuite
10:50 - 11:10 AM	<b>BREAK</b>					
11:10 - 12:00 PM	<b>Job Processing Part I</b> Carolyn Johnson	<b>Financial Report Users Discussion</b> Moderator: Michael Marks	<b>Financing for Growth</b> Jeff Gruender and Joe Thompson, CapitalSource	<b>SedonaFSU iPad Edition</b> Justin DeBaggis	<b>CSS Aeonix Telephony</b> David Crawford, CSS	<b>Going Paperless! Sell &amp; Sign Real Time</b> Tracy Larson, WeSuite
12:00 - 1:30 PM	<b>LUNCH - on the Palms Terrace &amp; Lawn</b>					
1:30 - 2:20 PM	<b>Job Processing Part II</b> Carolyn Johnson	<b>Financial Reporting Using Excel</b> Jim Lee, Astute Financial	<b>Management Best Practices Discussion</b> Moderator: Michael Barnes, Barnes Associates	<b>Collections &amp; Cancellations Management</b> Lisa Gambatese and Laurie Goodrich	<b>DSC and Sur-Gard</b> Chris Masse, DSC	<b>WeEstimate - Advanced Estimating Tools</b> Tracy Larson, WeSuite
2:30 - 3:20 PM	<b>Job Processing Part III</b> Carolyn Johnson	<b>Vivid Reports CPM</b> Jim Lee, Astute Financial	<b>Ineffective Sales Management Kills Growth</b> Gretchen Gordon, Braveheart Sales	<b>SedonaSync - Where to Find Answers</b> Matt Howe and Bridget Perea	<b>SageQuest</b> Bruno Delvecchio, SageQuest	<b>Business Forms, Proposal Documents &amp; Contracts</b> Tracy Larson, WeSuite
6:30 - 10:30 PM	<b>COCKTAIL RECEPTION, DINNER PARTY &amp; ENTERTAINMENT</b>					

Join us for cocktails on the Palms Terrace at 6:30 PM. Dinner and special entertainment will begin at 7:30 PM.

Dinner sponsor:



The SedonaLab will be open from 8:00 AM to 5:00 PM today.

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**SedonaOffice® USERS CONFERENCE**

MARCO ISLAND, FLORIDA  
 JANUARY 27 - 29, 2014



WEDNESDAY, January 29, 2014

	JOB MANAGEMENT Royal 3 & 4	CONTROLLING TYPES Sentry 1 & 2	MOVING THE NEEDLE Sabal	SEDONAOFFICE Coconut	IT WORKS! Sentry 3	WESUITE SALES BOOT CAMP Sentry 4
8:00 - 9:00 AM	<b>BREAKFAST - on the Palms Terrace &amp; Lawn</b>					
9:00 - 9:50 AM	<b>Job Processing Part IV</b> Carolyn Johnson	<b>Operator Best Practices Discussion</b> Moderator: Laurie Goodrich	<b>SedonaFSU Users Discussion</b> Moderator: Justin DeBaggis	<b>Recurring Revenue &amp; Rate Increases</b> Michael Marks	<b>5 Winning Manitou Combinations</b> Bob Bishop, Bold Technologies	<b>What's in the Numbers?</b> Tracy Larson, WeSuite
10:00 - 10:50 AM	<b>Ask the Trainer</b> Carolyn Johnson	<b>SedonaEnhancement</b> Kathy Carter	<b>SedonaSync Users Discussion</b> Moderator: Justin DeBaggis	<b>AP &amp; Inventory 1</b> Lisa Gambatese and Laurie Goodrich	<b>Data Mining 1</b> Matt Howe	<b>Sales Reporting for Sales Improvement</b> Tracy Larson, WeSuite
10:50 - 11:10 AM	<b>BREAK</b>					
11:10 AM - 12:00 PM	<b>Open Forum</b> Carolyn Johnson	<b>Dashboard and Metrics Reporting</b> Jim Lee, Astute Financial	<b>7 Ways to Boost Profits</b> Michael Marks	<b>AP &amp; Inventory 2</b> Lisa Gambatese and Laurie Goodrich	<b>Data Mining 2</b> Matt Howe	<b>Let's Talk Direction - 2014 Product Development</b> Tracy Larson, WeSuite
12:00 - 1:30 PM	<b>LUNCH - Palms Terrace &amp; Lawn</b>					
1:30 - 2:30 PM	<b>Open Forum Discussion with Don Faybrick, Michael Marks and the SedonaOffice team in Sabal.</b>					

**Have you visited the SedonaLab? Stop in before you leave hours today are 8:00 AM to 2:00 PM.**

Thank you to our 2014 Conference Sponsors

