



SUNDAY, January 22, 2017

5:30 7:30 PM

REGISTRATION AND WELCOME RECEPTION

MONDAY, January 23, 2017

8:00 9:00 AM

BREAKFAST

9:00 10:30 AM

State of SedonaOffice

Don Faybrick - Co-Founder, Perennial Software
Michael Marks - Co-Founder, Perennial Software

10:30 11:00 AM

BREAK

11:00 12:30 PM

General Session

12:30 2:00 PM

LUNCH & LEARNS: Comdata and OPT Business Services. Please refer to SOUC app for locations.

	Executive Track	SedonaOffice 101	SedonaOffice Advanced Users	Best Practices	Solutions Track	WeSuite
2:00 3:15 PM	<p>The Trump Effect</p> <p>What to expect under the Donald Trump Presidency as he makes the security industry great again.</p> <p><i>Will Schmidt, CapitalSource</i></p>	<p>SedonaOffice Overview</p> <p>This track will take a look at all SedonaOffice can do for you. We will take a look at the power of the Customer Explorer and how SedonaOffice is best used to manage your business.</p> <p><i>Kaitlyn Denninger and Lisa Gambatese</i></p>	<p>2016 New Features</p> <p>2016 was a very busy year, this track will overview all the new features and functionality released this past year. Learn what's new and how it can impact your business.</p> <p><i>Melissa Robinson and Jesslynn Lupo</i></p>	<p>AR Management & Collections</p> <p>Learn from experienced SedonaOffice customers on the best practices on managing your Accounts Receivable and Collections.</p> <p><i>Customer Panel Moderator: Bob Esquerra</i></p>	<p>SedonaOne Overview</p> <p>Take a look at the features of SedonaOne; Time & Attendance, eForms, AlarmBiller, Mobile Payments and Sales Force Automation.</p> <p><i>Michael Marks</i></p>	<p>So you've got a pile of Leads...now what?</p> <p>Use the WeOpportunity Import Tool to automate import of lead list, website contact form information, parts, contacts and customers directly into WeOpportunity.</p> <p><i>Samantha Perry, Account Executive</i></p>
3:15 4:30 PM	<p>Looking to Acquire?</p> <p>Acquisitions are a great way to grow your business. Learn the ins and outs on how to make acquisitions part of your company's growth strategy.</p> <p><i>Moderator: Michael Marks with panel of Industry Leaders</i></p>	<p>General Ledger Setup</p> <p>The GL is the heart of SedonaOffice, learn the power and structure of the GL, including Branches, Categories and Account structure and how to use these to create powerful financial statements.</p> <p><i>Lisa Gambatese and Bob Esquerra</i></p>	<p>Tips and Tricks</p> <p>There are so many "hidden gems" in SedonaOffice, this session will take a look at many of the most popular Tips and Tricks that you probably didn't know existed.</p> <p><i>Melissa Robinson and Jesslynn Lupo</i></p>	<p>Sales and Compensation</p> <p>This session is all about how to compensate your sales team. Learn from SedonaOffice experts how to calculate, track, and manage sales commissions.</p> <p><i>Customer Panel with SO Moderator</i></p>	<p>Bold Technologies</p> <p>The benefits of Manitou and SedonaOffice integration to eliminate lost revenue and improved efficiencies.</p> <p><i>Rod Coles</i></p>	<p>WeSuite Sales Strategies: 5 Key Drivers</p> <p>Join WeSuite and our special guest to learn the secrets to successful new business prospecting, commission plan incentives and validation through KPI reporting.</p> <p><i>Tracy Larson, President, & Special Guest</i></p>

6:00 7:30 PM

DINNER ON YOUR OWN OR IN MAIA AT THE JW MARRIOTT. ATTENDEES MUST BE SIGNED UP BY TUESDAY, JANUARY 17TH TO RESERVE A SPACE.



TUESDAY, January 24, 2017

7:30 9:45 AM **BREAKFAST KEYNOTE**

* Please plan on arriving for breakfast buffet so that you will be seated at 8:15 AM for the Breakfast Keynote.

Executive Track SedonaOffice 101 SedonaOffice Advanced Users Best Practices Solutions Track WeSuite

9:45 10:00 AM **BREAK**

10:00 11:15 AM

The Art of Service Excellence - Rapport	Accounts Receivable	Inventory	SedonaDocs	SedonaDashboard & Analytics	Strategies in Estimating I: Change Orders, Bid to Contractors & Builder Sales
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Different consumers define service excellence in different ways. The greatest service providers have the ability to identify the relationship needs of each client and adjust their approach to delight all types of customers.	This session will look at all the features and functionality of the AR module. We will explore everything from Invoicing and Collections through Payment Processing and Credit Management.	This session will dive into the advanced functionality of the Inventory Management features of SedonaOffice. We'll delve into functionality, features and processes, everything you need to know.	Document Management is a hidden gem of SedonaOffice, learn from our Users how they have implemented and used SedonaDocs to better manage their business.	Learn just how easy it is to setup and use SedonaDashboard and Analytics to create KPI's and give you insights into your business using the real-time interactive Dashboard.	Learn strategies for short form pricing presentation, scope writing, sending quotes efficiently to multiple parties and keeping the Forecast clean.
<i>Dave Mitchell</i>	<i>Kaitlyn Denninger and Laurie Salim</i>	<i>Melissa Robinson and Bob Esquerra</i>	<i>Customer Panel with SO Moderator</i>	<i>Matt Howe & Jim Mayes</i>	<i>Arturo Bravo, Director Deployment and Customer Support & Special Guest</i>

11:15 AM 12:30 PM

The Art of Service Excellence - Consultative Selling and Service	Customer RMR Management	Job Costing	SedonaAPI	Vivid Flex	Strategies in Estimating II: 6 Powerful Features for Commercial Estimating
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Dave shares a six step sales process that involves identifying critical needs, establishing personal and organizational credibility and framing products and services effectively to display maximum value to your client.	Managing RMR is essential, this track will delve into the RMR functionality and how to setup, maintain, track and create recurring invoices.	This session will dive into the Job Costing features within Work Orders. Learn the best practices and how to setup Job Costing using either WIP or Percentage Completion methods.	The SedonaAPI is one of the most powerful utilities available for SedonaOffice, this track will explain what it is and how it can benefit your business, including a few case studies.	Vivid Flex is ultra powerful, learn from Astutue Financial just how powerful this Excel based reporting system is and how you can use it to better report and analyze your business.	Learn how to create complex Estimates utilizing job Folder structures, variable price adjustment tools, Chargeable Items, Tax features, Automated Approvals & more!
<i>Dave Mitchell</i>	<i>Kaitlyn Denninger and Laurie Salim</i>	<i>Bob Esquerra and Lisa Gambatese</i>	<i>Travis Papay</i>	<i>Jim Lee</i>	<i>Tracy Larson & Arturo Bravo, Director Deployment and Customer Support</i>

12:30 2:00 PM **LUNCH & LEARN: Vivid Reports, Viakoo and WeSuite. Please refer to SOUC app for locations.**

Executive Track SedonaOffice 101 SedonaOffice Advanced Users Best Practices Solutions Track WeSuite

2:00 3:15 PM

The Art of Service Excellence - Client Retention and Service Recovery	Job Management 1	Service	SedonaSync	Vivid CPM Advanced	Stunning Proposals that Set You Apart from the Competition
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- There are two iconic moments when service providers and customers experience potential conflict: during sales objections and service deficiencies. Learn how to address each of these dangerous transactions.	This session will look at the Job Management Setup, the rules behind a Job and how to create a new Job and process the Job through Invoicing.	This session will look into the advanced features of the Service Management module, including costing, scheduling, document management and reporting.	SedonaSync is the most powerful and widely used SedonaOffice add-on module. This session will overview what it is and what it can do for your business.	Vivid CPM is a powerful and robust financial reporting application. If you require advanced financial reporting and budgeting then this session is for you.	Create modern, professional proposal documents using the new WeEstimate Document Creator that highlight your brand and set you apart from the competition.
<i>Dave Mitchell</i>	<i>Lisa Gambatese and Bob Esquerra</i>	<i>Melissa Robinson and Kaitlyn Denninger</i>	<i>Customer Panel Moderator: Brad Swindell</i>	<i>Jim Lee</i>	<i>Tracy Larson & Arturo Bravo</i>

3:15 4:30 PM

The Art of Service Excellence - Organizational Alignment	Job Management 2	RMR Reporting	SedonaFSU	OPT Web Services	Connected Selling: Sales Mobility for High Volume Sales
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Successful implementation of a service excellence culture requires a clear understanding of the industry environment, accurate identification of the measures of success and the clear articulation of the company's mission, values and capabilities that connect those two.	In this session we will look at the Job Costing features, including how to track all the income and expenses on a Job and the accounting rules and how they impact your financial statements.	Attrition Management is essential for any Security Company, this track will review the RMR Reporting features in SedonaOffice and using advanced tools like Vivid Reports.	SedonaFSU is a powerful productivity tool for your technicians. Learn how other companies are increasing efficiencies through their use of SedonaFSU.	OPT has taken SedonaSync to the next level and has created a Web Services module that can provide you insights to your business. You have got to see this to believe it!	Join WeSuite to learn how WeOpportunity, the Site Survey Module and QuoteAnywhere make high volume selling easier through the connected sales process.
<i>Dave Mitchell</i>	<i>Lisa Gambatese and Bob Esquerra</i>	<i>Jim Lee</i>	<i>Customer Panel Moderator: Jesslyn Lupo</i>	<i>Brad Swindell & Chris Edgar</i>	<i>Tracy Larson</i>

6:00 10:00 PM **COCKTAIL RECEPTION, DINNER PARTY AND ENTERTAINMENT**



WEDNESDAY, January 25, 2017

	Executive Track	SedonaOffice 101	SedonaOffice Advanced Users	Best Practices	Solutions Track	WeSuite
8:00 - 9:00 AM	BREAKFAST					
9:00 - 10:15 AM	Why Sales Teams Don't Perform and What To Do About It You feel the effects of sales force underperformance, but do you know the underlying causes? And, do you know what to do to fix it? In this session you will learn the common underlying causes of sales force underperformance and you will walk away with specific actions to take to help turn the team around and elevate sales.	Service 1 This session will review the processing of a Service and Inspection Tickets from inception through completion, and the setup rules and all its options.	Master Accounts Master Accounts is one of the most powerful yet under-used features in SedonaOffice. This track will explain the features, setup and usage of Master Accounts.	Customer showcase Key initiatives that customers have implemented in 2016. Listen to how customers have creatively used SedonaOffice to provide solution to critical business problems.	SedonaOne Overview Take a look at the features of SedonaOne; Time & Attendance, eForms, AlarmBill, Mobile Payments and Sales Force Automation.	NEW! WeSuite Innovation Zone Featuring interactive challenge stations, cool WeSuite swag and Tech Talks to show how WeSuite continues to drive cutting edge sales solutions.
	<i>Gretchen Gordon, Braveheart Sales Performance</i>	<i>Laurie Salim and Mellissa Robinson</i>	<i>Lisa Gambatese and Bob Esquerra</i>	<i>Customer Panel with SO Moderator</i>	<i>Michael Marks</i>	
10:15 - 11:30 AM	Prepare for Exit on Day One Buying or selling an alarm company is both an art <i>and</i> a science. Operators must excel at both. Learn long-term strategies to buy businesses today and maximize the value of your business for exit tomorrow. Learn how to start	Service 2 This session will dive into the SedonaSchedule board, and how this is used to manage your Appointments, Service Tickets, Inspections and Jobs.	Vivid CPM Lite for SedonaOffice New for SedonaOffice customers: Vivid CPM Lite. Explore the benefits of Vivid CPM with this exclusive version for SedonaOffice customers.	Problem Solved This discussion by SedonaOffice staff will answer questions you submitted prior to the conference with creative ideas and solutions.	SQL Reporting Matt will once again dive into the powerful features of creating your own reports using SQL reporting features both in SedonaOffice or SQL Reporting Tools.	
	<i>Eric Pritchard, Kleinbard LLC</i>	<i>Laurie Salim and Mellissa Robinson</i>	<i>Bob Esquerra and James Briscoe</i>	<i>Lisa Gambatese and Jim Mayes</i>	<i>Matt Howe</i>	
11:30 AM - 12:30 PM	Open Discussion with Don Faybrick and Michael Marks - Perennial Software, Co-Founders					
12:30 - 1:30 PM	LUNCH					