WeSuite
Growing Sales Strong

2022 Workshop Sessions & Schedule

Tuesday, August 2nd

1:00 – 5:00 PM **Registration Cambria Hotel Lobby**

5:30 – 7:00 PM **Welcome Networking Reception Cambria Hotel Lobby Bar Area**

Wednesday, August 3rd

7:00 – 8:00 AM **Breakfast on the Terrace**

8:00 – 9:00 AM **System Administrator Best Practices**
Instructors: Boris Rapoport, Rich Johnson, Michelle Domino

Getting new software release updates is exciting - there are new features, enhancements, and yes – bug fixes! New releases can also feel a bit daunting. This session focus' on what our Q&A Team does to approve releases, our technical team to deploy, and best practices for you to implement to ensure the update process goes as smoothly and efficiently as possible for you and the sales team. After attending this session, you will be able to:

- Understand WeSuite's Release Quality Assurance & Testing Process
- Identify areas you can easily improve new release acceptance.
- Create and utilize a test plan for your team for new release acceptance.

9:00 – 10:00 AM **Highlights: From the Latest Release Notes**
Instructors: Rich Johnson & Samantha Perry

Let's start by reviewing release notes together. We will remind you of where to locate release notes and how to use them to suit the needs of your team. We will also review feature and enhancement highlights in the latest release at the time of the Workshop, as well as those listed below.

- Job Copy – Proposal and Contracts
- New Customer & Location Search
- Fixed Price Contracts – Contract Pricing Only enhancement
- Automated Approvals - Copying Approval Plans

10:00 – 10:15 AM **Coffee & Stretch Break**

10:15 – 11:00 AM **Best Estimating Practices: How do we ensure our estimates are accurate?**
Facilitator: Tracy Larson
Instructors: John Nemerofsky & Jaret Alexander, SAGE Integration

What do we focus on to make sure our estimates are as accurate as possible? What are factors and situations we've learned to pay attention to? How far can a salesperson go on their own? Which features help us most to keep estimating on track and accurate?
After attending this session, you will be able to:

- Determine ways to estimate more accurately
- Employ best practices for reviewing and approving estimates
- Consider estimating features to add or remove from your workflow
- Coach your team & share best practices

11:00 – 12:00 PM **WeSuite Features Our Leadership and Sales Team Love & Why!**
Facilitator: Michael Magnani
Instructors: Kaity Nugent, American Alarm and Communications, Inc., John Nemerofsky & Jaret Alexander, SAGE Integration

This session is all about the features WeSuite clients use and love. Our client instructors will provide examples of problems and challenges faced in their sales process and the features they have used to resolve them. They will also share favorite user and leadership features and why. After attending this session, you will be able to:

- Understand how other WeSuite clients approach features to improve their process
- Validate process challenges and potential solutions
- Identify additional features sets you may want to implement

12:00 – 1:00 PM **Lunch on the Terrace**

1:00 – 2:15 PM **Round Table Discussion 1 – Approvals & Commissions**
Facilitators: WeSuite Team Member at each table

This first round-table discussion focus' on how companies are using the Automated Approvals and Commission Management modules in WeEstimate. Meeting table Moderators will have questions and topics ready for discussion and will also facilitate discussions in the direction the group is most interested in. Don't worry, even if you aren't using a module, there is plenty to talk about surrounding what has been implemented and why, as well as what companies are thinking about doing. We will have twenty minutes for participants to discuss each topic. The final 20 minutes of the session will share round table discussion results.

2:15 – 2:30 PM **Coffee & Stretch Break**

2:30 – 3:30 PM **New Integrations**
Instructors: Tracy Larson, Samantha Perry, Michael Magnani

During 2021 WeSuite focused on major new integrations and enhancements that we are very excited to share with you. In this session we will provide an overview of each of the following:

- ADI Price Catalogue integration
- Blackleaf Connect database integration
- FieldHub integraton
- DealerAlly integration
- Managely integration

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3:30 – 4:45 PM **Sales Process Best Practices: Using WeSuite to Increase Your Sales**
Instructor: Audrey Pierson, Audrey Pierson Consulting

"Always be closing" is a sales mantra we often hear. In this session, Audrey Pierson will review specific sales behaviors that are necessary to close sales. She'll show you how WeOpportunity and WeEstimate can be used to support and enhance these processes. She will share insights from accountability, pipeline development and management, to moving sales to next stages, when to move on, and getting to the win. After attending this session, you will be able to:

- Identify and qualify the best lead opportunities
- Create proposals quickly and accurately
- Understand how to use WeSuite as your go-to software for follow up
- Improve your close ratio

4:45 – 5:00 PM **Daily Wrap Up!**

5:30 – 9:00 PM **Cambria Lobby for Team Dinner & Super Fun Night Out!**

Thursday, August 4th

7:00 – 8:00 AM **Breakfast on the Terrace**

8:15 – 9:00 AM **WeSuite "future" Technology Platform: QuoteAnywhere and the Site Survey 3.0**
Instructors: Tracy Larson, Itai Bar-David

We are excited to show you the next generation of WeSuite! This session will focus on the latest release of QuoteAnywhere and the Site Survey 3.0 including workflow, features, and where we are headed with this new technology platform. After attending this session, you will be able to jump on board if you're ready!

9:00 – 10:15 AM **Round Table 2: Selling Managed Services; Pricing Updates & Supply Chain Challenges**
Facilitators: WeSuite Team Members

This second round-table discussion focus' on how companies are offering and selling managed services and tackling database part updates and supply chain challenges. Meeting table Moderators will have questions and topics ready for discussion and will also facilitate discussions in the direction the group is most interested in. We will have twenty minutes for participants to discuss each topic. The final 20 minutes of the session will share round table discussion results.

10:15 – 10:30 AM **Coffee & Stretch Break**

10:30 – 11:30 AM **Sales Reporting: What We Want to Know and Why**

Facilitator: Samantha Perry

Instructors: Ken Whelan, Engineered Security Systems & TBA

This session discusses sales data most important to WeSuite client companies and why. From leadership to sales teams our client instructors will share what reports are most important to them, how often, and why. They will also talk about how they get accountability, and benefits to both sales and the organizational goals. WeSuite will provide recommendations for easy data capture through key fields in WeOpportunity and WeEstimate. After attending this session, you will be able to:

- Improve sales reporting within your organization.
- Coach salespeople on use of data.
- Using sales data to monitor KPIs.

12:00 – 1:00 PM **Lunch on the Terrace**

1:00 – 2:00 PM **Key System Configuration Items & Impacts Refresher**

Instructors: Michael Magnani & Stephen Nasti

This refresher provides a great overview for key system configuration areas within the software that ensures opportunity development and estimating accuracy for your team. We will cover mixture of system-wide settings, region and office settings, and user settings. Whether a veteran user or new to WeSuite, this session will assist you now and into the future as your company grows and changes. After attending this session, you will be able to:

- Understand differences between system-wide and local settings.
- Add and modify: Data Lists, Tasks, Appearances, Forecast
- Configure Group Rights and User settings.

2:00 – 2:30 PM **WeSuite Document Editor & Enhancements!**

Instructor: Ed Terracciano

This session will provide an overview of the WeSuite document editor and how it can provide you and your team with beautiful, professional proposal documents. Enable salespeople to create custom scopes of work that highlight specific areas of projects, while preserving the company proposal template for uniformity and consistency. New enhancements will also be featured. After attending this session, you will be able to identify key WeSuite document editor features to take advantage of such as:

- Enhance cover page, cover letters, and scopes of work: images, font styles, tables, etc.
- Multiple “Ts & Cs” templates for Proposals
- Show Parts, Labor, Chargeable Items, RMR Items, Lease Options *separately* from Estimate Folder presentation.
- Include part images at the line-item level in the Bill of Materials.
- Option Folders: check box pricing selections for “option” Folders.
- Utilize “formulas” to present specific items for non-standard situations (i.e. show / do not show specific items based on description key words).

2:30 – 2:45 PM **Coffee & Stretch Break**

2:45 – 3:15 PM **Best Practices: Revisions, Change Orders, Renewals, and Upgrades**
Instructors: Samantha Perry and Tracy Larson
WeSuite includes great features to easily create and track revisions, plan for an create Change Orders, and sell renewal services. This class provides a quick how-to on each of these so that you and your team increase efficiencies, improve project tracking, and sell more easily. After attending this class you will be able to:

- Easily create and track estimate and proposal revisions
- Use WeEstimate change order features to create one or multiple change orders
- Quote “renewal” and “upgrade” service contracts

3:15 – 4:45 PM **Roundtable 3: New Salespeople, Proposal Design & Updates, Quick Sales & Upselling**
Moderators: WeSuite team members
Our third and final round-table discussion focus’ on 3 topics: how companies are onboarding and training new users and providing refresher training; new proposal design and proposal updates; best practices for quick sales and upselling. Meeting table Moderators will have questions ready for discussion and will also facilitate discussions in the direction the group is most interested in. We will have twenty minutes for participants to discuss each topic. The final 30 minutes of the session will share round table discussion results.

4:45 – 5:00 PM **Daily Wrap Up!**

5:30 PM – 9:00 PM **Cambria Lobby for a quick walk to dinner and a relaxing evening out!**

Friday, August 6th

7:30 – 8:30 AM **Breakfast on the Terrace**

8:30 – 9:00 AM **2022 WeSuite Road Map & What’s Happening in Software Development**
Leaders: Tracy Larson, Michael Fazio
Let’s get a look into what’s next on the horizon at WeSuite. This session will bring you up to date on product enhancements, the features, functionality, and platform road map our product management and development team is working on into 2023.

9:00 – 9:30 **Workshop Wrap Up**

9:30 - 11:30 AM **Workshop Innovation Zone**
The WeSuite Innovation Zone is back! It’s your turn to play with the features and functionality presented and discussed in the workshop before heading back to the office. Use this time to ask questions, try new things, and be ready to return to implement and teach your team. WeSuite will provide exercise examples for you to try, as well as challenges for you to test your skills!

11:30 – Noon **Bon Voyage for Home & the Weekend!**