WeSuite
Growing Sales Strong

2024 Workshop Sessions & Schedule

We are excited for the upcoming WeSuite Workshop taking place in White Plains at the Cambria Hotel **Tuesday, February 6th - Friday, February 9th.** As always, we've got a powerhouse agenda of interactive classes, round table discussions, and networking opportunities for you.

Special hotel rates end Friday, Dec 15th!
Registration: $949 per person & includes classes, networking events, and meals.

Tuesday, February 6th

1:00 – 5:00 PM **Workshop Check-in, Cambria Hotel Lobby**

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

Wednesday, February 7th

7:00 – 8:00 AM **Breakfast**

8:00 – 9:00 AM **New Features & Enhancements: Highlights from the Latest Releases**

Kicking off the Workshop, we'll get going by reviewing latest release notes, features, and enhancements together. A reminder of where to find release notes and how to use them to suit the needs of your team. We will highlight the latest release at the time of the Workshop, in addition to selections from recent past releases. We will also confirm how easy it is to receive new releases and steps to update your production environment.

After this session you will:

- Be familiar with new features and enhancements from releases 6.8 to the latest.
- Identify and select features and enhancements most helpful to share with your team.
- Understand the importance of remaining up to date on latest releases.

9:00 – 10:00 AM **Building Meaningful Sales Pipelines to Shorten the Sales Cycle**

All sales start as leads. Building an accurate pipeline is key to success. Understanding where the right leads come from, removing non-qualified leads, identifying opportunity development milestones, monitoring, and tracking process, are critical to increased efficiency and success in sales. We will hear how one of our clients coaches their team using WeOpportunity to build accurate sales pipelines, focusing on the right opportunities to clarify and take next steps, shortening the sales cycle, and providing reliable sales reporting for salespeople, sales management, and executive management.

After this session you will:

- Be able to implement a repeatable lead qualification process.
- Identify best practices utilizing sales stages, latest actions, and pipeline percentages for accurate pipeline reporting.
- Track your team's activities and results to identify areas to fill and empty your sales pipeline to shorten the sales cycle.

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

10:15 – 11:00 AM **RMR is King! Capitalizing on Quoting and Selling RMR in WeSuite**

Selling recurring services is a cornerstone to overall profitability and long-term account 'stickiness'. This session covers capitalizing on configuration and use of basic and advanced features of quoting and selling RMR in WeSuite. From monitoring, to test and inspection, preventative maintenance, financing systems, and managed services, WeSuite provides ways to standardize pricing methodologies to help your sales team to quote accurately, efficiently, and present service options and pricing for acceptance by customers.

After this session, you will be able to:

- Identify RMR configuration variations for easiest and best service pricing for sales.
- Understand the use and meaning of the "RCM" field and calculations in WeSuite.
- Confirm presentation options for service, subscription, and finance options on proposal and contract documents.
- Incentivize RMR sales via quota settings and commission calculations.

11:00 – 12:00 PM **5 Tips for Modernizing Your Proposal to Stand Out from the Competition**

Looking for ways to make your proposal tower over the competition? Your proposal document is your number 1 most presented marketing piece. During this session we will provide 5 proposal design tips to help you and your team modernize your proposal, focus on the impact on the buyer, and separate you from the competition.

After attending this session, you will be able to:

- Consider estimate configuration techniques for presentation to prospects and customers.
- Compare current proposal graphical best practices to your existing proposal document.
- Identify WeSuite Document Editor features to utilize to enhance your proposal.
- Recommend a variety of pricing presentation options for your team's use.
- Help your team with presentation of 'Options' and 'alternates' to help buyers make decisions.

12:00 – 1:00 PM **Lunch**

1:00 – 2:15 PM **Estimating Best Practices for Accuracy & Profitability – Panel Discussion**

Estimating accuracy is key to delivery excellence by your team, satisfying customers, and preserving profitability. 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? These and other estimating best practice questions will be answered by our panel of experts.

After attending this session, you will be able to:

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

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

2:30 – 3:30 PM **Sales Leadership: Using WeSuite to Lead My Sales Team – Client Presentations**

Sales leaders are responsible for many things: achieving company sales goals, individual sales rep's goals, accountability, coaching and mentoring salespeople, and perhaps even selling your own accounts. Time is always a premium with so much to do. Learn how WeSuite helps sales leaders and salespeople to set and track goals, improve coaching and mentoring, and help salespeople to act more intelligently and independently. Additionally, our presenters will show how they utilize system data to monitor leading indicators for next actions, learn for change, and improve leadership with the help of their WeSuite systems.

After attending this session, you will be able to:

- Identify specific areas of workflow improvement for you and your sales team.
- Utilize sales data for better team and individual coaching.
- Understand metrics, reporting, and KPIs showing team and individual accountability.
- Calculation of close ratios and accurately providing sales forecasts.

3:30 – 4:45 PM **Round Table 1**

Our round table discussions are always highly rated. This is your chance to discuss relevant sales topics with peers, to share ideas and approaches, validate concepts or methods, and walk away with information you and your team may use going forward. WeSuite team members will be at each table participating as facilitators, and reporting discussion points to all attendees. Our topics for Round Table 1 are:

1. How Buyers are buying differently today.
2. Ways to shorten the Sales cycle without losing quality.

4:45 - 5:00 PM **Daily Wrap Up!**

5:30 – 9:00 PM **Cambria Lobby for Delicious Dinner Out!**

Thursday, February 8th

7:30 – 8:30 AM **Breakfast**

8:45 – 9:15 AM **WeSuite 360 – The Next Generation of WeSuite!**

This session provides a peek behind the Development curtain. We will review top priorities in progress and planned for 2024. We will share new feature sets for the QuoteAnywhere platform, including the workflow design being implemented for WeOpportunity into the application, and other key 2024 platform initiatives.

After attending this session, you will:

- Gain insight into WeSuite 2024 QuoteAnywhere platform priorities.
- Understand the design workflow of WeOpportunity within QuoteAnywhere as a single platform.
- See how WeSuite is defining new feature sets and designing the User interface to make the application as easy and effective to use as possible.

9:15 – 10:15 AM **QuoteAnywhere & Site the Site Survey**

The focus of this session is on the latest workflows and features included in QuoteAnywhere and the Site Survey. We will demonstrate the application from start through completion of the sales process, including new estimate creation and signing, use of the site survey tool for interactive solution design, creation of revisions, changes orders, signing on the device or via email, and the value of partnering QuoteAnywhere with WeEstimate to handle a variety of simple to complex sales.

After attending this session, you will be able to:

- Understand the use of QuoteAnywhere for a variety of selling opportunities.
- Identify features your team can take advantage of today.
- Utilize QuoteAnywhere from the desktop and in mobile sales scenarios.

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

10:30 – 12:00 PM **2nd Round Table**

Our second Round Table discussion centers around two important topics for sales and business growth:

1. What's new in RMR product and services? Definition, pricing, and selling.
2. Best Practices using WeSuite to take on new: markets, product lines, and customer types.

12:00 – 1:00 PM **Lunch**

1:00 – 2:00 PM **Onboarding & Offboarding to Optimize WeSuite for Sales Success – Client Presentation**

Onboarding new hires successfully and efficiently is critical in providing an optimal environment for sales success. Establishing a consistent and repeatable process to support company goals, train new employees to understand and accurately meet expectations, and provide feedback data, enables growth, and increases profitability. An established offboarding process ensures distribution of active opportunities and estimates, sales accountability, and maintenance of licensed users. Lead by two of our WeSuite Clients, this session provides insight into User and 'key role' onboarding and offboarding processes, newly acquired teams, examples of lessons learned, best practices, and resulting success.

After attending this session, you will be able to:

- Create or update new User onboarding plans for your team.
- Consider User Right creation and assignments related to roles and responsibilities for easier maintenance of your system.
- Establish a User offboarding plan and checklist for implementation.

2:00 – 2:30 PM **Sales Reporting: Best Practices and Exciting URG Enhancements Your Team Will Love**

Real-time, accurate sales reporting is one of the most important needs for salespeople, sales management, financial, and executive leadership. Data accuracy validates how individuals and teams are doing to goal, how robust the pipeline is, areas of growth and retraction, and how to plan labor needs, and predict cashflow. During this session we will review new URG features, keeping report up to date, and critical data that helps salespeople stay on track for next steps.

After attending this session, you will be able to:

- Utilize and share new features and functionality with your team.
- Identify key data points that produce the results most important for your team.
- Create essential sales reports illustrating sales in every stage, sales types, revenue achieved, and revenue potential.

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

2:45 – 3:30 PM **Secrets to Being a Great System Administrator - Panel**

Let's hear from the pros! WeSuite System Administrators share key aspects of their roles including 'trade secrets' in working with sales leaders, salespeople, and executives; configuration best practices; improving sales workflows; user training plans; system maintenance and updates; working with IT and technical resources; and cross departmental coordination in support of company growth and change. Wow! System Administrators are heroic!

After attending this session you will be able to:

- Confirm System Administrator responsibilities and how they impact system and User success.
- Identify (5) best practices for maintaining your WeSuite system.
- Assist your team to improve their system training and requests for help.

3:30 – 4:45 PM **Roundtable 3:**

Our third Round Table discussion centers around two topics that always get sales teams talking! What we've learned from:

1. Defining and monitoring Sales Quotas
2. Our Lead to Quote sales workflows

4:45 – 5:00 PM **Daily Wrap Up!**

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

Friday, February 9th

7:30 – 8:30 AM **Breakfast**

8:30 – 9:00 AM **2024 WeSuite Road Map & What's Happening in Software Development**

WeSuite will provide an update from the Development hive! What we're working on, procedures enacted to continually improve quality output, and WeSuite focus for the next 6-8 months.

After attending this session, you will be:

- Aware of near term WeSuite development projects
- Up to date on the WeSuite Quality Assurance & internal testing process
- The WeSuite API

9:00 – 9:30 AM **Workshop Wrap Up**

9:30 - 11:30 AM **One-on-One Time with WeSuite**

Take advantage of time to sit down with WeSuite team members to talk about all things WeSuite from use of our integrations, to configuration and Add-On Module questions, to technical assistance, or even feature demos – this is a great opportunity to spend a little one-on-one time together!

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