

WeSuite 2025 Workshop

Wednesday, August 6

7:00 – 8:00 Breakfast

8:00 – 9:00 AM Tour the New QuoteAnywhere!

Kicking off the 2025 workshop will be a walk through the latest features in QuoteAnywhere. Web-based, responsive, and able to handle simple to complex sales, QuoteAnywhere makes the lead-to-close sales process easy and efficient. Let's tour QuoteAnywhere like a salesperson.

- What's a Sales Project?
 - Lead creation and management
 - Estimate creation
 - Presentation and Non-Presentation Modes
 - Journal
 - Approvals and Alerts
 - Proposal and Contract document creation & sending
 - Signing on the spot and sending documents for signature
 - Change Orders

9:00 – 10:00 AM QuoteAnywhere: System Configuration 1

In this first of two System Configuration classes, we will review the System Configuration feature sets available in QuoteAnywhere focused on Regions, Offices, and Users. In addition to User setup and configuration, this session will highlight new features that enable creation of Permission Groups, Thresholds, Labor Rights, and Passing for multiple users. We will also review configuration and assignment of pre and post-sale approval systems in QuoteAnywhere.

- Users (Basic information, People Manager, Group Rights)
 - Regions, Offices,
 - Groups:
 - Permission Groups
 - Thresholds
 - Labor Rights

- Passing
- Approval Systems (Automated Approval Module)

10:00 – 10:15 AM **Break**

10:15 – 11:00 AM **QuoteAnywhere: System Configuration II**

This session will focus on additional important areas of System Configuration in QuoteAnywhere that enable application customization for your WeSuite system as indicated below:

- Sales Projects (Stage Management)
- Data Point Management
- System Data List Management
- Brands Feature Settings & Use
- ***Fixed Price Contract Module** – contract configuration
- Default Folders
- ***Finance Lease Module** – finance/lease configurations
- Tax Settings

*Connotes use of a QuoteAnywhere Add-On Module

11:00 – 12 PM – **Editors Review in QuoteAnywhere**

This session will focus on the Editors in QuoteAnywhere that enable your settings and control of parts, labor, chargeable items, subcontractors, and more.

- Editors:
 - Material configuration
 - Pricing Contract selection / designation
 - Add / Configure / Associated Items / Labor / Disable
 - Symbol Mapping
 - Labor configuration
 - Chargeable Items configuration
 - Subcontractors
 - ***Test & Inspection Module** - Items
 - Services
 - Packages

*Connotes use of a QuoteAnywhere Add-On Module

12 – 1 PM **Lunch**

1:00 – 2:15 PM – **Internal Training – Training New Users & Introducing System Changes.**

We've got a great panel lined up to share insight into best practices in training new users and updating existing users with new features, releases, and changes in their sales and business operations. Topics we'll cover include:

- Onboarding and training new users
- Refreshing existing team members
- Presenting new release notes
- How to request help, report a bug or technical issue
- Utilizing WeSuite tools: webinars, the Knowledge Base
- Presenting business level changes to Users
- Off-boarding users and distributing leads and estimates

2:15 – 2:30 **Break**

2:30 – 3:30 PM **New in QuoteAnywhere & WeEstimate!**

We have introduced many new features over the last year and especially in the first six months of 2025, as QuoteAnywhere is now a 'stand-alone' web application in addition to a module in WeEstimate. This session will provide you with a review of new features and enhancements in QuoteAnywhere and WeEstimate so that you may put them to work for your team. Highlights include:

- Group Rights, Ownership, & Pass Groups
- Custom Data Points
- The Universal Report in QuoteAnywhere
- Single Sign On 'SSO'
- New PSA Part Integration

3:30 – 4:45 **Round Table (2)**

1. **Handling Tariffs and Supplier Price Increases:** Economic conditions and fluctuations in product and labor pricing are ever evolving. This round table will focus on how you are handling supplier price increases, tariffs, and other costs in

your WeSuite system and translating pricing changes to proposal and contract documents.

2. **Sales Forecasting for Budget Creation & Management:** WeSuite data provides historical, current, and projected insights into sales revenue, the length of your sales cycle, market verticals, gross profit margins, and individual and team success. This Round Table discussion is centered on use of WeSuite sales data in the annual business budgeting process and quarterly updates for greater accuracy in forecasting sales, new and existing outright and recurring revenue.

4:45 PM - **Wrap Up and Dinner Plans!**

5:30 PM – **Dinner** - Meet in the lobby to head out for a great dinner!

Thursday, August 7th

7:30 – 8:30 AM **Breakfast**

8:30 – 9:00 AM **Using AI to Enhance Client Support**

Pete Consodori will present how he and the WeSuite Support team took on an internal AI challenge and the results put in place to create greater efficiency for helping WeSuite clients. Pete will share the journey from AI chat bot creation through refinement, what we've learned, and how best to use this feature of support for you and your team. This promises to be interesting and fun!

9:00 – 10:15 AM **Introducing SELENA.AI and WeSuite AI Advisory Group**

This is a surprise you don't want to miss! We look forward to showing you our newest AI projects and how they may help your team. We will also have an engaging discussion with all of you, our AI Advisory Group, and AI Development lead.

10:15 – 10:30 AM **Break**

10:30 – 11:30 AM **Round Table 2:**

1. **Using AI in Sales** – Let's share ideas and experiences on using AI in sales. This round table is all about how we can use AI to improve the sales process from improving lead quality and targets to greater accuracy in estimating, scope writing,

and more. The goal: making all aspects of the sales journey easier, more efficient, and more productive.

2. **Marketing Best Practices** – from targeted, effective content development, to finding the right market channels, to lead generation tools that connect marketing to sales, this round table is focused on sharing modern marketing best practices working for you and your team.

11:30 AM – 12 Noon **The Sales Forms Module**

During this session we will review the configuration and use of the Sales Forms Module. Learn how to create your own forms for assignment and use at the Customer and Estimate levels in your WeSuite system. Capture information needed during the sales process to help improve sales estimating such as site survey information, record additional information at booking to close finance and delivery gaps downstream. Creation and use is easy and will help you remove manual forms from your process.

You will learn how to use the forms designer to:

- Create form data fields
- Layout, design, and save forms
- Create required information fields
- Preview forms and edit on the fly
- Connect forms to the Customer or Estimate levels
- Generate forms & utilize completed forms with other areas of WeSuite

12:00 – 1:00 PM **Lunch**

1:00 – 2:00 PM **Lead Creation & Management in QuoteAnywhere!**

- Sales Projects: Lead to Estimate to Close – the complete sales workflow in QuoteAnywhere.
- Lead details:
 - Sales Stages
 - Data Points
 - Calendar events
 - History & reporting
- Moving to QuoteAnywhere for Lead creation and management

2:00 – 2:30 PM **Proposal Documents: Managing Estimate Revisions**

This class reviews how to create and manage estimate and proposal “Quote Package” revisions. WeSuite provides excellent features for creating, tracking, and managing quote revisions. We will review how to create and send changes to estimates, how to document revisions for easy tracking, and how to ensure sales reporting is not ‘double counting’ so that your sales team gets your forecast right.

We will cover:

- review of proposal packages and revision creation and tracking
- creating a new proposal package or copying an existing package
- Managing estimate revisions

2:30 – 2:45 **Break**

2:45 – 3:30 PM **Document Management, Proposal and Contracts in QuoteAnywhere**

One of the most important things we do is to automate the production of proposal and contract sales documents. This session will review the creation of documents, templates, and maintenance of templates such as cover letters, scopes of work, terms and conditions, and programming of proposal and contract documents.

- System Template Maintenance
 - o Options
 - o Document Editors: Scope of Work, Cover Letter, Terms & Conditions
 - o Email Body
- User Templates:
 - o Cover Letter, SOW
 - o Spell check
 - o Highlighting text in SOW
- Including ‘attachments’ on proposal pages
- Electronic Signature integration highlights
 - o Sales workflow
 - o User configuration
 - o Document Asset Control

3:30 – 4:45 PM (2) Round Table

- 1. Estimating labor accurately for higher profitability** - labor is one of the most difficult items to estimate and the one most important for profitability or loss. This discussion will focus on best practices for estimating sales from simple to complex, keeping labor cost and sell rates up to date, and tracking estimate accuracy to actual work performed.
- 2. How do Sales Engineers increase Sales Productivity & Profitability?** – companies that include sales engineering as part of their sales process have noted many benefits. We will discuss cost and “ROI” that Sales Engineers bring to the sales process and how best to use sales engineering in your process.

4:45 – 5:00 PM Wrap Up

5:30 PM Dinner - Meet at the lobby for a fun evening out!

Friday, August 8th

7:30 – 8:30 AM Breakfast

8:30 – 9:30 AM WeSuite Roadmap Updates

- Organizational plans and updates
- QuoteAnywhere Road Map feature & Modules
- AI mindset throughout WeSuite and how it benefits you!

9:00 – 9:30 AM Workshop Wrap Up – taking it home!

9:30 – 11:30 AM One on One Meetings with WeSuite!

Reach out to book your meeting today. We are also offering (15) Minute Consultation appointments with our AI Expert!