



# EVOLVE

## LEADERSHIP SUMMIT

September 24-25, 2024 | Baraboo, WI 53913

### Monday, September 23, 2024

**5:00 - 8:00 PM**      **Cocktail Reception**  
[The Keg](#)  
732 Oak Street  
Wisconsin Dells, WI 53965

### Tuesday, September 24, 2024

**8:30 - 9:00 AM**      **Registration**  
[Al Ringling Theatre](#)  
136 4th Avenue  
Baraboo, WI 53913

**9:00 - 11:00 AM**      **Sean Bott**

**11:00 - 11:30 AM**      **Meet with Sean Bott**  
(Optional)

**11:30 AM - 12:45 PM**      **Travel & Lunch Provided**  
(At University)

**12:45 - 1:00 PM**      **Kickoff**  
Tim, Chelsey & Dirk

**1:00 - 2:00 PM**      **Building a Custom Report or Search**  
Dirk & Ally

**2:00 - 2:30 PM**      **Client Record & Dashboard**  
Jenny & Dirk

**2:30 - 3:00 PM**      **Billing - Excel Export**  
Jenny

**3:00 - 3:15 PM**      **Break**

**3:15 - 4:45 PM**      **This Year's Release Notes and Tips & Tricks**  
Jenny, Ally, Chelsey & Emily

**4:45 - 5:15 PM**      **My CRM**  
Tiff & Emily

**5:15 PM**      **Free Time**  
Relax & unwind - check out these chambers for entertainment & dining options:  
[Baraboo Area Chamber of Commerce](#)  
[Wisconsin Dells Visitor & Convention Bureau](#)

### Wednesday, September 25, 2024

**8:00 - 8:30 AM**      **My Workspace - End User Optimization**  
Kali & Carmen

**8:30 - 9:00 AM**      **Time Entry Optimization**  
Tim, Frank & Kali

**9:00 - 10:00 AM**      **Insights (Power BI)**  
Dirk

**10:00 - 10:15 AM**      **Break**

**10:15 - 11:15 AM**      **Capacity Planning**  
Dirk

**11:15 - 11:45 AM**      **Management Dashboard**  
Kali

**11:45 AM - 12:45 PM**      **Lunch Provided**

**12:45 - 1:45 PM**      **PracticeERP General Ledger**  
Dirk

**1:45 - 2:45 PM**      **OPEN - FIRMS to Present Group Discussion**  
Chelsey

**2:45 - 3:00 PM**      **Break**

**3:00 - 3:45 PM**      **isolved & Motus**  
Dirk & Tricia

**3:45 - 4:30 PM**      **Workiro**

**4:30 - 5:00 PM**      **CPA 360 & Closing Session**  
Tim, Chelsey & Dirk

**5:30 - 8:30 PM**      **Dinner & Reception Provided**  
[Grateful Shed](#)  
1470 Wisconsin Dells Parkway  
Wisconsin Dells, WI 53965

**We've included our agenda, travel information, and hotel booking details, [here](#).**

