



EVOLVE

LEADERSHIP SUMMIT

with CPA 360 + PracticeERP



September 23-25, 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**
[UW-Platteville Baraboo Sauk County](#)
 1006 Connie Road
 Baraboo, WI 53913

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

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

2:00 – 2:30 PM **Client Record & Dashboard**
Jenny & Ally

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 & HubSpot**
Emily & Tiff

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

[UW-Platteville Baraboo Sauk County](#)
 1006 Connie Road
 Baraboo, WI 53913

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 – 9:30 AM **Insights (Power BI)**
Dirk

9:30 – 10:00 AM **Capacity Planning**
Dirk

10:00 – 10:15 AM **Break**

10:15 – 10:45 AM **Enhancements**
Dirk & Jared

10:45 – 11:30 AM **Management Dashboard**
Kali & Kim

11:30 AM – 12:00 PM **Ask Blue J**

12:00 – 1:00 PM **Lunch Provided**
[UW-Platteville Baraboo Sauk County](#)
 1006 Connie Road
 Baraboo, WI 53913

1:00 – 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**
Tricia & Rick

3:45 – 4:30 PM **Workiro**
David & Jason

4:30 – 5:00 PM **Enhancements & Closing**
Dirk, Tim & Chelsey

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

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