

# INTELLIEVENT PROFITABILITY SUMMIT (IPS) 2023

## MONDAY, October 2

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**8:00-3:00** Golf, Arrivals and Local Activities

**4:00-7:00** **Ferrante's Bayview – Monterey Marriott** 350 Calle Principal  
**Customer and Vendor Appreciation Opening Reception**

**Afterwards please enjoy dinner on your own**  
*Enjoy the local restaurants*

## TUESDAY, October 3

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**Monterey Marriott** 350 Calle Principal

**9:00-9:30** Continental Breakfast

**9:30-10:00** **Introductions and Opening Remarks** – Don Romeka, CEO

**10:00-11:15** **2023 IntelliEvent Product Overview** – Andrew Ehler, CRO

**11:15-11:45** **Sponsor Presentations**

**11:45-1:15** Lunch

**Walk to IntelliEvent's HQ** 560/552/536 Fremont St

**1:15-2:30** **Session 1 - Training / Executive Session**

**2:30-2:45** Coffee Break & networking

**2:45-4:00** **Session 2 - Training / Executive Session**

**Dinner and networking**

## WEDNESDAY, October 4

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**IntelliEvent's HQ** 560/552/536 Fremont St

**9:00-9:30** Breakfast

**9:30-10:45** **Session 3 - Training / Executive Session**

**10:45-11:15** Coffee Break & networking

**11:15-12:30** **Session 4 - Roundtables with rotating topics/  
Executive Session**

**12:30-1:30** Lunch

**1:30-4:00** **One on One with Project Managers and Dev**

Schedule your one on one on the "Sign up for IPS" link

**Extra Curricular Networking - scheduled fun activities**

Golf, Stand up Paddle boarding, Kayaking, Bay Boat Tour, etc.

**Dinner and networking**

# THURSDAY, October 5th

IntelliEvent's HQ 560/552/536 Fremont St

9:00-1:00

## One on One with Project Managers and Dev

Schedule your one on one on the "Sign up for IPS" link

## Extra Curricular Networking - scheduled fun activities

Golf, Stand up Paddle boarding, Kayaking, Bay Boat Tour, etc.

1:00-2:00

## Upcoming NEW Features

2:00-4:00

## Development Symposium

## Dinner and networking

Stay and enjoy a Workcation!

## Sessions

<u>Tuesday, October 3</u>	Operations 2 Track	Operations 1 Track	Sales and Accounting Track	Executive Track
Session 1 - Training	Daybook/ Logistics	Labor Planning & Scheduling	Job Entry IntelliSign/Costing Reporting	Executive Session
Session 2 - Training	Check In Check Out	POs Routing	CRM/Opportunities Pipeline Reporting/Dashboard	Executive Session
<u>Wednesday, October 4</u>				
Session 3 - Training	Maintenance Assembly Orders Work Orders	Inventory Packages/Kits	Accounting 360 Payments Financial Reporting	Executive Session
Session 1 - Roundtables	We will assign groups of like-minded companies to discuss these topics in preparation for the Development Symposium			
	Template beautification RFID Labor app/Mobile Interface		eCommerce into IntelliEvent Business Intelligence Tools Integrations	