

## Competency Levels

### Beginner

#### Building Core Knowledge

Designed for advisors who are building foundational knowledge of the topic and want to start confidently applying core concepts in client conversations.

### Advanced

#### Deepening Expertise

Designed for experienced advisors looking to deepen expertise and apply concepts to more complex, strategic, and higher-value scenarios.

## Tuesday, August 11<sup>th</sup> – Early Bird Session

11:15 AM - 12:00 PM

All Levels • Room: Texas Ballroom D • Workshop

### The AI Enabled Advisor: How to Turn the Biggest Technology Shift in Decades Into Revenue

*Sam Nelson, VP of CX + AI, Telarus*

AI is no longer a future conversation. It is changing how businesses operate, and customers are overwhelmed by the pace of innovation. In this high energy opening session, Sam Nelson, VP of CX and AI at Telarus, will break down where the real AI revenue opportunities exist for technology advisors and where customers are actively investing across CX, cloud, cybersecurity, and advanced networking.

This is not a technical deep dive. It's a practical roadmap for advisors who want to confidently position AI, open larger strategic conversations, and uncover entirely new revenue streams. From AI-powered experiences and intelligent automation to infrastructure, security, governance, and networking, discover how AI is reshaping the technology stack and creating massive opportunities for technology advisors willing to lead the conversation. The next era of technology advisory is here. The question is: will you lead it?

4:15 PM - 4:45 PM

## Beginner • Room: Texas Ballroom 6 • Whiteboarding

### **The Employee and Customer Experience Playbook: Turning Collaboration Tools into Workforce Strategy**

*Supplier: Zoom*

Collaboration tools are now central to how businesses operate and grow. This session shows you how to position communications as part of a larger workplace strategy focused on productivity, employee and customer experience, and flexibility. Learn how to connect collaboration, mobility, and engagement tools into a unified solution that drives higher-value opportunities.

## Advanced • Room: Texas Ballroom 5 • Workshop

### **From Contact Center to Revenue Engine: Elevating CX Conversations**

*Supplier: Five9*

Customer experience is no longer a support function, it's a growth strategy. This session shows you how to position CCaaS and AI-driven automation around measurable outcomes like revenue per interaction, retention improvement, and workforce optimization. You'll explore how to attach analytics, CX, and AI tools to build larger, stickier deals. Walk away with a framework for transforming contact center opportunities into strategic, value-driven engagements.

## Advanced • Room: Texas Ballroom 4 • Case Study

### **Business Continuity Beyond Backup: Building a Resiliency Roadmap**

*Supplier: 11:11*

Downtime isn't just an IT issue, it's a business risk. This session explores how to position backup, disaster recovery, and cloud resiliency as essential to operational continuity and financial protection. Learn how to build long-term opportunities by framing resiliency as an ongoing strategy rather than a one-time solution.

## Beginner • Room: Texas Ballroom 3 • Case Study + Whiteboarding

### **Turning Distributed Infrastructure into Expansion Opportunity**

*Supplier: Granite*

Managing multi-location clients is complex, and full of hidden growth potential. This session explores how to unify connectivity, mobility, lifecycle management, and operational visibility into a scalable infrastructure strategy that executives care about. You'll learn how to uncover expansion triggers within distributed environments and position infrastructure as a business continuity and cost-control lever. If you sell into retail, healthcare, financial services, or franchise models, this session will sharpen your multi-site growth strategy.

### **Advanced • Room: Texas Ballroom 1 • Case Study**

#### **Infrastructure Lifecycle Strategy: Managing Complexity at Scale**

*Supplier: CommandLink*

As client environments grow more complex, lifecycle management becomes a strategic differentiator. This session explores how to position visibility, optimization, and vendor coordination as executive-level value drivers. You'll learn how to identify inefficiencies and expansion triggers within existing accounts. Designed for advisors focused on long-term account growth and operational optimization.

### **Advanced • Room: Texas Ballroom 2 • Facilitated Panel**

#### **From Data to Decisions: How AI is Driving Real Business Outcomes**

*Suppliers: CBTS, Rapidscale, Giltech*

AI is quickly becoming part of everyday business conversations, but knowing where it actually fits can be challenging. In this session, you'll explore real-world examples of how organizations are using AI to turn data into actionable insights, from video analytics to operational improvements. Walk away with a clearer understanding of where AI creates value and how to start identifying opportunities within your client base.

**5:00 PM - 5:30 PM**

### **Beginner • Room: Texas Ballroom 3 • Whiteboarding**

#### **Simplifying the Modern Workplace: Packaging Collaboration for Business Impact**

*Supplier: GoTo*

Workplace technology is often fragmented, creating both confusion and opportunity. This session focuses on how to position collaboration and communications tools as part of a broader productivity and employee experience strategy. You'll learn how to connect mobility, meetings, messaging, and support tools into a unified outcome story that resonates with decision-makers. Ideal for advisors looking to increase attach rates within existing accounts.

### **Advanced • Room: Texas Ballroom 4 • Workshop**

#### **Designing CX That Drives Growth: Turning Interactions into Strategic Revenue Plays**

*Supplier: NiCE*

Customer experience is no longer just about support, it's about driving revenue and loyalty. In this session, you'll learn how to position Alpowered CX solutions around measurable outcomes like retention, efficiency, and customer satisfaction. Discover how to expand conversations beyond interactions into broader opportunities across analytics, automation, and workforce optimization.

### Beginner • Room: Texas Ballroom 6 • Case Study Deconstruction

#### **The Hidden Opportunity: Expanding Customer Conversations Across the Technology Stack**

*Supplier: Comcast Business*

Connectivity often opens the door, but it shouldn't be where the conversation stops. This session explores how to turn network discussions into broader infrastructure opportunities tied to performance, reliability, and business continuity. Learn how to expand deals by layering in redundancy, security, and cloud connectivity.

### Advanced • Room: Texas Ballroom 2 • Facilitated Panel

#### **Secure Access Everywhere: Networking, Security, and the Future of Connectivity**

*Suppliers: Cato, Cisco, Megaport, MetTel*

As users, applications, and data move beyond traditional networks, connectivity and security must evolve together. In this session, you'll learn how organizations are modernizing infrastructure to deliver secure, high-performance access from anywhere. Discover how to identify gaps in legacy environments and position scalable, resilient solutions.

### Beginner • Room: Texas Ballroom 1 • Case Study

#### **Broadband to Business Outcomes: Scaling Mid-Market Infrastructure**

*Supplier: Spectrum*

Broadband often opens the door, but what comes next? This session focuses on turning connectivity conversations into broader infrastructure discussions tied to uptime, performance, and cost control. You'll learn how to position redundancy, SD-WAN, and security layering to increase solution depth. Ideal for advisors building momentum in the mid-market space.

### Advanced • Room: Texas Ballroom 5 • Demo + Case Study

#### **Secure AI in Action: Controlling Access to LLMs Without Compromising Data**

*Supplier: Expedient*

AI tools like ChatGPT are already being used inside your clients' businesses—often without oversight. In this session, you'll learn how to help organizations safely adopt AI by controlling access to large language models while protecting sensitive data. See a live demonstration of how secure AI environments enable innovation without risk, and discover how to turn AI conversations into opportunities across security, compliance, and data protection.