



## Annual Conference Agenda

April 19-22, 2017



### ROYAL SONESTA HOTEL

NEW ORLEANS

Wednesday, April 19, 2017	
6:00 pm to 8:30 pm	Registration & Welcome Dinner Reception with Partners (Courtyard & Fleur de Lis)
Thursday, April 20, 2017 (Grand Ballroom & Evangeline Suite)	
7:30 am - 8:30 am	Breakfast with Partners
8:30 am - 9:00 am	Welcome and DIA Business <b>Patrick Jacobwith, Opening Remarks</b>
9:00 am - 10:00 am	<b>Supervisory Special Agent Wendell Watts, FBI, New Orleans Field Office</b> <i>– Understanding the Cyber Threat Landscape</i>
10:00 am - 10:30 am	Platinum Case Study: <b>Lee Rozeboom, Great America &amp; Patrick Jacobwith, Sunset Dental: <i>Less Painful Than a Root Canal</i></b>
10:30 am - 10:45 am	Break / Partner Networking
10:45 am - 11:00 am	Gold Presentation: <b>Rapid Fire Tools, Mark Winter</b>
11:00 am - 11:30 am	Case Study: <b>David Kern, Intronis &amp; Mark Pontius, Compass Network - <i>I Learned From That: Disasters I Survived &amp; What They Taught Me</i></b>
11:30 am - 11:45 pm	Gold Presentation: <b>Weave, Robb Miller</b>
11:45 pm - 12:45 pm	Lunch with Partners
12:45 pm - 1:00 pm	Partner Networking Opportunity / Set up for Roundtables
1:00 pm – 1:10 pm	Mini Roundtable Introduction and Objectives
1:15 pm - 2:50 pm	Mini Roundtables (4 sessions/tables of 20 min each) – 4 Plats w/5 min exchange
2:55 pm – 3:55 pm	<b>Brad Schow, HTG Peer Group – <i>Blind Spots that Prevent MSP Growth</i></b>
4:00 pm	Daily Wrap Up
5:00 pm to 7:00 pm	<b>Connections &amp; Cocktails:</b> Open bar & heavy hors d’oeuvres (Jazz Playhouse)

***MUST be present to win Raffle Prizes***

<b>Friday, April 21, 2017 (Grand Ballroom &amp; Evangeline Suite)</b>	
8:00 am - 9:00 am	Breakfast with Partners (collect Saturday roundtable surveys)
9:00 am - 9:15 am	Opening Remarks, <b>Patrick Jacobwith</b>
9:15 am - 9:30 am	HIPAA Update, <b>Amy Wood</b>
9:30 am - 10:30 am	<b>Kristen Capone, CompTIA – Business Agility</b>
10:30 am - 10:45 am	Gold Presentation: <b>ConnectWise, Brian Cordell</b>
10:45 am - 11:00 am	Partner Networking Opportunity
11:00 am - 11:30 am	Platinum Case Study - <b>Alex Rogers, Chartec &amp; Dan Edwards, Pact One: <i>It's All in the Process: Close Deals Faster and Make More Money</i></b>
11:30 am - 11:45 am	Gold Presentation: <b>HIPAA Secure NOW!, Patrick Felicitta</b>
11:45 am - 12:45 pm	Lunch with Partners
12:15 pm - 1:00 pm	Board of Directors Election
1:00 pm - 1:15 pm	Partner Networking Opportunity / Set up for Roundtables
1:15 pm - 1:25 pm	Mini Roundtable Introduction and Objectives
1:25 pm - 3:00 pm	Mini Roundtables (5 sessions/tables of 15 min each) 5 Golds w/5 min exchange
3:00 pm - 3:15 pm	Reset for final presentations
3:15 pm - 3:30 pm	Gold Presentation: <b>Citrix Sharefile, Kevin Brown &amp; Keith Mattox</b>
3:30 pm - 4:30 pm	<b>Standing on the Shoulders of Giants: Steve McNamara, DTC</b>
4:30 pm	Partner Recognition / Daily Wrap Up
4:30 pm to 5:30 pm	Partner Recognition Cocktail Reception Dinner on your own
<b>Saturday, April 22, 2017 (Members Only)</b>	
8:30 am - 9:30 am	Breakfast
9:30 am - 10:00 am	DIA Housekeeping
10:00 am - 12:00 pm	Round Table: <b>Moderator, President - Integrator Executive Roundtable, Open Forum / Various Issues</b>
12:00 pm	DIA Business / Conference Closing: <b>Patrick Jacobwith</b>

**Thank you to the  
2016 Board Members**

**Patrick Jacobwith - President  
Jeffrey Weiss  
Dan Edwards  
Amy Wood  
Kim Kiernan**

***MUST be present to win Raffle Prizes***

# Guest Speaker



## Supervisory Special Agent, Drew Watts



Cyber Intrusions / New Orleans Division

**Drew Watts** is a native of Alabama and a graduate of the University of Montevallo, where he received a Bachelor of Administration in Accounting. Drew joined the FBI in 2004 and has been assigned to both the Atlanta Division and the Mobile Division where he worked all FBI violations, to include taking on additional operational duties as the Assistant Coordinator for the Weapons of Mass Destruction program, member of the FBI's HAZMAT Team, and member of the FBI's Crisis Negotiation Team.

In 2011, Drew was promoted and assigned to FBI Headquarters, Criminal Investigation Division, working as a Supervisory Special Agent in the Public Corruption and Civil Rights Unit. In 2012, Drew was designated the Acting Unit Chief of the Civil Rights Unit, taking on the oversight responsibilities of the Civil Rights program across the United States. In late 2013, Drew received a field promotion and relocated to the New Orleans Division, where he is currently serving as the Cyber Intrusion Supervisory Special Agent, investigating both national security and criminal matters impacted the State of Louisiana, the U.S. and abroad.

Contact SSA Watts:

504-816-3000

**Federal Bureau of Investigations, New Orleans Division**

[www.fbi.gov](http://www.fbi.gov)

## Guest Speaker



### Brad Schow



**Brad Schow** is part of a team of coaches and consultants serving the IT industry. Prior to joining the HTG Peer Groups staff, he spent 20 years helping grow a solutions and managed service provider. His path of technician, service leader, operations leader, president and partner give him a unique perspective that allows him to relate to a broad spectrum of business challenges.

Brad's company was a member of HTG for many years. He credits much of the success to the peer group experience and the relationships that grew out of HTG. He loves investing in people, thinking ahead, building teams, and helping others find success.

Today's presentation is a series starter for a Planning for Success series with 2-3 subsequent webinars to take place through the DIA University.

Contact Brad:

712-794-7955

**HTG Peer Groups**

[bschow@htgpeergroups.com](mailto:bschow@htgpeergroups.com)

[www.htgpeergroups.com](http://www.htgpeergroups.com)

## Guest Speaker



### Kristen Capone



**Kristen Capone** has successfully held senior leadership roles throughout her career in both direct and indirect selling models, specifically in the software industry, most recently security and disaster recovery.

Making her mark in the IT channel, having been named one of CRN's Top 100 Women of the Channel multiple times, Kristen has developed partner strategy and executed sales and marketing programs for technology partners in the reseller and distribution channel; including system integrators, independent software vendors, solution providers, LARs and retailers, in both the public and private sectors.

Kristen is most passionate about teaching and training and stands out by grounding partner and vendor perspective in customer need. Always beginning with a 'start with the customer' point of view to help partners solve real world problems for their customers with technology.

Kristen founded, and is presently running Capone Capital, a consulting company specializing in helping organizations with channel strategy.

Contact Kristen:

603-459-9414

**CompTIA - Faculty**

[kristencapone@icloud.com](mailto:kristencapone@icloud.com)

[www.comptia.org](http://www.comptia.org)

# Partners

## **PLATINUM**



### **Lee Rozeboom & David Pohlman**

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GreatAmerica Financial Services partners with MSPs, VARs, and resellers in the channel to help them successfully grow their businesses and create long term relationships with their clients. By using a strong financing strategy with GreatAmerica, your customers will upgrade their technology more frequently, improve their service experience, increase your cash flow, and ultimately reinforce yourself as the trusted advisor to your clients. Partners across the country are having amazing success by matching a hardware and project monthly payment with their Managed Services monthly payment.



### **Neal Bradbury**

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Intronis offers world-class business continuity and disaster recovery (BCDR) solutions to Managed Service Providers (MSPs) for resale under a transformative, fixed-price model. MSPs can re-brand and bundle these with other services to grow customers and profits. Intronis has won numerous awards for innovation and dedication to the channel, including a "Best Channel Vendor" recognition by Business Solutions Magazine in 2016. Intronis was acquired in October 2015 by Barracuda Networks (NYSE: CUDA). Learn more at [www.intronis.com](http://www.intronis.com).



### **Alex Rogers, Ashley Sandoval & Taevi Wilson**

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#### **Innovation. It's what we do. It's who we are.**

Since its inception in 2010, CharTec has been about one thing: standing out in a world that's designed to blend in. A firm believer in taking the road less traveled, CharTec is an award-winning, all-encompassing IT service training organization that helps MSPs transform their businesses into multi-million dollar companies. We provide innovative and proven techniques to running a business, so that our Members can build self-sustaining operations. There are no cookie-cutters here, only custom-made business solutions to take your company into the next stage of revenue growth. It's that simple.

**GOLD**



**Robb Miller**

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Weave makes it easier for front office staff to do their job, build stronger relationships with patients and grow the practice. It works seamlessly with practice management software, making relevant data instantly available through on-screen prompts. This helps the staff make patients feel important and get them in more regularly. It keeps chairs full, the front office happy and the practice healthy.



**Brian Cordell**

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ConnectWise transforms how technology solution providers successfully build, manage, and grow their businesses. Our award-winning set of software solutions provide a seamless experience to companies in more than 50 countries, giving them the ability to increase their productivity, efficiency, and profitability. When combined with our commitment to innovation, passion, and more than 30 years of experience, ConnectWise software solutions deliver the support companies want at each step of their business journey. Be a part of our game-changing community, come to our events, and see the benefits for yourself. For more information, visit [ConnectWise.com](http://ConnectWise.com).



**Mark Winter**

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RapidFire Tools, Inc., makes Network Detective, the #1 non-invasive IT assessment tool used by thousands of service providers around the world. It acquires a vast amount of network data – including assets, users, configurations, and vulnerabilities – and generates a wide array of professionally designed, completely brandable reports by the MSP. Network Detective includes a series of different IT assessment and IT compliance modules, each sold separately or in bundles through low-cost annual subscriptions. RapidFire Tools also offers a line of software appliances that deliver deeper dive assessments, cybersecurity alerts, and enhanced remote automation. All products sold with a 30-days money-back guarantee. To learn more, visit [www.rapidfiretools.com](http://www.rapidfiretools.com) or call 678-323-1300, ext. 2.

## **GOLD Cont.**



### **Patrick Felicetta & Jonathan Krasner**

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When MSPs and other providers of technology to healthcare entities need help to get their clients and their own organizations compliant with HIPAA, they partner with the experts at HIPAA Secure Now! They recognize that HIPAA compliance and patient data security requires more than technology, and developing and maintaining the necessary compliance expertise in-house requires more resources than they can afford to commit. HIPAA Secure Now! is a complete solution which provides the required risk assessment, policies and procedures and training, delivered by a compliance portal which provides a repository for compliance documentation, and \$100,000 of Financial Protection applicable to fines and breach expenses. Thousands of clients across the country have discovered how HIPAA Secure Now! can make compliance surprisingly simple and affordable, with pricing beginning at only \$999 for a one-year subscription. To learn more, visit [www.hipaasecurennow.com](http://www.hipaasecurennow.com).

## **CITRIX® ShareFile**

### **Kevin Brown & Keith Mattox**

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Citrix ShareFile for Healthcare is a simpler, more efficient way your private practice, clinic and hospital can share patient information and DICOM studies – without sacrificing safety. With our ability to support HIPAA compliance, you can experience more productive patient visits and focus on improving care.



## **SILVER**



### **Justin Reinmuth**

Why **techrug**? Because we're technology professionals just like you. We understand the unique risks your IT business is exposed to every day and have created a complete, customized insurance solution to better protect your company. Our TechMal (Technology Malpractice) program offers clients a one-of-a-kind E&O product that can't be found anywhere else. Add this to our propriety pricing model, and 92 percent of techrug's clients experience a savings between 21 and 56 percent when switching from their previous carrier.



### **Jim Lewis & Tim Devitt**

Equus Compute Solutions customizes white box servers and storage solutions to enable flexible software-defined infrastructures. Delivering low-cost solutions for the enterprise, software appliance vendors, resellers, and cloud providers, Equus is one of the leading white-box systems and solutions integrators. Over the last 28 years, we have delivered more than 3.5 million custom-configured servers, software appliances, desktops, and notebooks throughout the world. Our advanced systems support software-defined storage, networking, and virtualization that enable a generation of hyper-converged scale-out applications and solutions. From components to complete servers, to fully customized fixed-configurations, white box is our DNA. Find out how to enable your software-defined world with us at [www.equuscs.com](http://www.equuscs.com).



### **Laura Miller**

Aspida Mail offers a comprehensive solution for HIPAA Compliant Encrypted Email, including email archiving, retention and backup for six years along with robust Spam and Malware Protection. We are a true email solution – offering both inbound & outbound encryption. We manage MX records of existing domains or allow users to purchase a single address on our domain (ex: [drjohnsmith@aspidamail.com](mailto:drjohnsmith@aspidamail.com)). With Aspida Mail, there is no software to install, maintain or update. All plans offer simple, month-to-month pricing with no contracts, no set-up fees and no hidden costs. HIPAA Compliant Email – Simplified.

## **SILVER Cont.**



### **Matt Weinbender**

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Apple Butter Software is the maker of Venga, the premiere dental & medical intra-office communicator, and NexTime Fingerprint TimeClock, a complete biometric-based time & attendance suite. Both products are excellent fits for new and existing dental practices and fill a niche that isn't well served by the big box practice management softwares. We have a fanatical user base of more than 12,000 and are poised to grow considerably in the next year. We're an independent software company that places the highest value on making products that not only improve productivity, but are fun to use - software that inspires!



### **Jeff Broudy & Danielle Mckinley**

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PCIHIPAA has over 20 years' experience making Compliance, Data Protection, and Payments easy and affordable for medical practices. We specialize in Payment Card Industry (PCI) and HIPAA Compliance. What would you do if your client's computer was stolen, or your their patient data was hacked? Unfortunately, too many practices don't have the answers. PCIHIPAA becomes their Incident Response Team, and we also help evaluate all PCI and HIPAA vulnerabilities. In addition, our comprehensive Compliance Program provides HIPAA and Data Breach coverage in case of a breach or HIPAA violation. It all starts with a mandatory HIPAA Risk Assessment. In less than 5 minutes, practices are provided a HIPAA Risk Score and a 15 page risk analysis summarizing their vulnerabilities. In addition, we provide a complimentary risk consultation. Every day practices acquire more and more patient data. It's not a matter of if they'll experience an incident, it's a matter of when.



### **Peter Schaub & Alfonso Coyle**

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NeoCertified has provided our HIPAA Compliant Secure Email Solution to businesses of all sizes, across all 50 states since 2002. We offer both inbound and outbound email encryption solutions, which include our flagship Secure Email Solution, as well as our cutting edge CustomerConnect secure contact form. Our solutions are compatible with all versions of Microsoft Outlook, including Office 365; our secure portal can be accessed from any internet-connected device; and we even offer secure mobile apps both for Android and Apple phones. With NeoCertified, there are no MX records to manage, there is no software to be installed, and there are no minimum license purchases for partner-resellers. We also provide BAA's to all clients, a monthly billing option, and 24/7 customer support for all clients and email recipients. All partners have access to a plethora of marketing materials, an online partner portal, and a partner media kit full of videos, whitepapers, and much more! NeoCertified is here to ensure that our partners and clients are protected and supported at all times.

**SILVER Cont.**



## **Linda Harvey & Debi Carr**

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As a Dental Integrator leader, you set and follow high professional and technical standards. Why not complete that process? Partner with credentialed dental HIPAA/HITECH experts who will complement your expertise by assisting you and your clients to fulfill the required administrative and physical safeguards and risk analysis.

With a combined total of decades of in-office dental experience, we understand the day-to-day challenges your clients face. We bring high-touch and personalized attention into the high-tech world. Protecting clients' information systems is an ever-vigilant process. Clients rely on your technical expertise to protect their practices and you can rely on us to fully support you and your clients. D.K. Carr & Associates | The Linda Harvey Group